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The
Textile/Apparel
Industries

FAIRCHILD FACT FILE

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THE TEXTILE/APPAREL INDUSTRIES

Current Trends

The year 1984 started on a high note for fiber, textile and apparel companies in the U.S. National employment was up, inflation slowing, consumers were spending, and inventories were generally depleted. Business was good until the third quarter, then the bottom fell out. Consumer spending levelled off just as imports of apparel and other textile products poured into the country at record levels. The soft goods pipeline soon became clogged with inventory, and this problem has carried over to the detriment of business through the first half of 1985.

Most mill executives look for marked improvement in the second half of the year, but the consensus is that 1985 is shaping up as a difficult year for domestic fiber, textile and apparel producers. The combined value of shipments of textiles and apparel by U.S. manufacturers registered an 8.3% decline in the first four months of 1985 compared with the same 1984 period, according to the American Apparel Manufacturers Association. Meanwhile, imports of textiles and apparel in the January-April period this year were up 7.1% from a year earlier; exports fell 3.8%. The unemployment rate for April in the textile mill sector was 14%. For apparel it was 11.5% (compared with a national average of 7.3%).

Imports are the single most pressing problem for the fiber and textile industries. They are viewed with mixed feelings by components of the apparel industry which have established overseas operations to meet the competition of foreign producers head-on. Foreign producers are wooing in turn American retailers to buy directly overseas. Nevertheless, the fiber, textile and apparel complex has come together in a strong coalition to back the passage of the import-slashing Textile and Apparel Trade Enforcement Act of 1985 which has been introduced in Congress. It is claimed that this bill, if passed, would cut textile/apparel imports by an estimated 20%. However, it is not supported by the Administration, based on overall global concerns.

The total U.S. trade deficit last year amounted to $123 billion, of which textile/apparel products accounted for 13%. Currently the textile/apparel deficit exceeds $17 billion. Imports doubled in the past three years and over 300,000 jobs were said to be lost in this period (mainly due to imports but also to greater automation and cost-cutting measures in U.S. plants).

An analysis of apparel sourcing by Kurt Salmon Associates (March 1985) showed that the landed, duty-paid value of apparel imported into the U.S. in 1984 amounted to $12.8 billion, or 26% of U.S. apparel supply. Of this, half was sourced directly abroad by retailers, and this share is expected to more than double by 1995, spurred by the growing move on the part of retailers to merchandise private labels as well as maintain a supply of lower-priced apparel.

Retailers are actively fighting passage of the Textile and Apparel Trade Enforcement Act to protect these positions. However, there have been indications that attitudes toward off-shore sourcing may be softening somewhat. Reports are heard of greater awareness of problems involved with the long lead time needed in placing orders, the longer financing period, the inflexibility in open-to-buy positions, the inability to reorder, and uncertainties on the quota status of supplier-countries. Stores were hurt by the sharp markdowns necessitated by the glut of imports, delivery of which had to be accepted in spite of the downturn in sales.

CURRENT TRENDS

Fiber and textile producers, for their part, are stepping up efforts to survive. A massive program aimed at U.S. consumers, called "Crafted With Pride in the U.S.", has been mounted. Heavy investments have been made in machinery and equipment to raise productivity, lower costs and shorten time between orders and delivery. Mills are stepping up efforts to develop closer communication with their apparel manufacturer customers, knowing their needs and the design and style demands of their key accounts, as well as generally improving service and rapport.

Meanwhile, textile and apparel consolidations and plant closings continue, and unprofitable lines are eliminated. Automation and computerization, where affordable, is proceeding and the apparel industry is involved in the so-called TC Square project of Draper Laboratories to automate apparel sewing techniques. The final answer to the import problem lies in technology which will give American-made products the edge. The immediate outlook depends on the outcome of government action on imports.

GENERAL INDUSTRY STATISTICS

The fiber/textile/apparel complex is composed of several major segments and processes: fibers (man-made and natural), fabrics (woven, knit and non-woven) and three major end-uses of fabrics: apparel, home furnishings and industrial uses. Then there are related processes, including extruding, spinning, weaving, designing, dyeing, printing, finishing, converting, cutting, knitting, importing, exporting, etc.--separate segments by themselves (i.e. done by independent companies) or combined to some extent in large, vertically integrated companies.

The major segments of the complex are closely linked together, sharing common goals and problems but in some aspects--particularly in relation to the matter of imports--the segments are separate entities, with distinctive competitive pressures which seem to be growing.

Detailed industry statistics are currently being released by the Census Bureau based on the 1982 census of manufacturers. Reports are incomplete but will eventually supply the most detailed information since the last previous census was compiled covering 1977 operations. (The next census will cover 1987 operations).

From currently-available census data, the following table covers comparisons for major segments of the industry, for 1977 and 1982.

GENERAL INDUSTRY STATISTICS

General Statistics by Industry Classification

Industry	1982	1977(r)
CELLULOSIC MAN-MADE FIBERS (SIC 2823*):		
Number of companies	5	5
Number of establishments	9	10
With 20 employees or more	9	10
Total employees (thous.)	14.2	15.9
Production workers (thous.)	10.8	12.5
Payrolls, total (mil. $)	291.0	212.8
Value added by manufacture (mil. $)**	428.7	325.7
Cost of materials (mil. $)	806.8	680.8
Value of industry shipments (mil. $)***	1,239.9	998.9
Capital expenditures, new (mil. $)	88.4	29.3
ORGANIC FIBERS, NONCELLULOSIC (SIC 2824*)		
Number of companies	44	37
Number of establishments	71	66
With 20 employees or more	58	58
Total employees (thous.)	60.4	74.0
Production workers (thous.)	43.3	54.8
Payrolls, total (mil. $)	1,385.5	1,086.1
Value added by manufacture (mil. $)**	3,329.7	2,804.4
Cost of materials (mil. $)	4,973.4	3,618.1
Value of industry shipments (mil. $)***	8,287.5	6,379.7
Capital expenditures, new (mil. $)	443.2	338.5
TEXTILE MILL PRODUCTS INDUSTRY (SIC 22*)		
Number of companies	na	5,733
Number of establishments	6,615	7,202
With 20 employees or more	3,655	4,131
Total employees (thous.)	720.7	875.7
Production workers (thous.)	617.7	764.6
Payrolls, total (mil. $)	9,242.4	7,881.4
Value added by manufacture (mil. $)**	na	16,104.5
Cost of materials (mil. $)	28,891.3	24,753.2
Value of industry shipments (mil. $)***	47,790.7	40,550.5
Capital expenditures, new (mil. $)	1,569.7	1,223.5
APPAREL INDUSTRY, EXCLUDING OTHER FABRICATED TEXTILES (PART OF SIC 23*)		
Number of companies	na	17,310
Number of establishments	17,745	19,777
With 20 employees or more	9,176	10,243
Total employees (thous.)	1,015.4	1,149.1
Production workers (thous.)	866.8	1,001.1
Payrolls, total (mil. $)	9,993.2	7,951.7
Value added by manufacture (mil. $)**	na	16,211.9
Cost of materials (mil. $)	21,334.5	16,067.0
Value of industry shipments (mil. $)***	43,059.0	32,031.9
Capital expenditures, new (mil. $)	508.4	340.3

(continued)

General Statistics by Industry Classification
(continued)

	1982	1977(r)
MISCELLANEOUS FABRICATED TEXTILE PRODUCTS (SIC 239*)		
Number of companies	na	6,444
Number of establishments	6,568	6,728
With 20 employees or more	1,723	1,689
Total employees (thous.)	173.4	185.2
Production workers (thous.)	140.9	155.5
Payrolls, total (mil. $)	2,120.7	1,706.9
Value added by manufacture (mil. $)**	na	3,459.4
Cost of materials (mil. $)	5,798.9	4,798.5
Value of industry shipments (mil. $)***	10,347.1	8,213.2
Capital expenditures, new (mil. $)	167.7	116.4

na - not available
(r) - revised

* Industry definitions, as classified in the official Standard Industrial Classification System: Cellulosic Man-made Fibers (SIC 2823) and Organic Man-made Fibers (SIC 2824) are parts of the Chemical & Allied Products Industry (SIC 28)

Textile Mill Products Industry (SIC 22) included mills engaged in any of the following operations: (1) preparation of fiber and manufacture of yarn, thread, braids, twine, cordage; (2) manufacture of knit and woven fabrics and of carpets and rugs from yarn; (3) dyeing and finishing operations; (4) coating, waterproofing, special treating of fabrics; (5) the integrated manufacture of knit apparel and other finished articles from yarn; (6) the manufacture of felt goods, lace goods, non-woven fabrics and miscellaneous textiles.

Apparel & Other Textile Products (SIC 23) (the cutting-up and needle trades) includes establishments producing clothing and fabricated products by cutting and sewing purchased woven or knit textile fabrics and related materials, such as leather, plastics, fur, etc. Besides clothing, the industry includes manufacturers of curtains and draperies, household textiles, canvas products and other fabricated textiles, which are covered by the three digit code 239. As noted, knitwear made in knitting mills (rather than cut and sewed) is classified in SIC 22.

** The value added by manufacture is derived by subtracting the cost of materials, supplies, energy, contract work, etc., from the value of shipments of products manufactured plus receipts for services rendered. The result is then adjusted upward with the addition of merchandising costs. The value added figure avoids the duplication in the value of shipments which results from the use of products of some establishments as materials by others. Figures for 1982 on value added have been suppressed by the Census Bureau in preliminary reports, but will be included in final reports, after inventory data reported for 1982 has been evaluated.

(footnotes continued)

GENERAL INDUSTRY STATISTICS

(Footnotes continued)

*** The value of industry shipments includes for all establishments classified within each industry (a) the value of products primary to the industry; (b) the value of all secondary products which are primary to other industries; and (c) miscellaneous receipts (contract work, etc.) and resales. The value of shipments on a product basis, including the output of both primary and secondary producers, is covered in the section on VALUE OF PRODUCT SHIPMENTS.

Source: U.S. Bureau of the Census, Census of Manufactures, 1977; 1982 Preliminary Report, Summary Series (MC82-SUM-1(P); Final reports: MC82-1-28B.

Number of Companies & Mills (Plants) in Specified Industries
(Classified by Primary Products)
& Value of Industry Shipments, 1977, 1982(p)

	Companies			Number Mills/Plants		Industry Shipments (Mil. $)*	
	1982	1977(r)	1982 Total	With 20+ Employees	1977(r) Total	1982(p)	1977
Fibers (man-made)							
Cellulosic	5	5	9	9	10	$1,239.9	$ 998.7
Noncellulosic	44	37	71	58	66	8,287.5	6,379.7
Textile mill products							
Yarn & thread mills	na	529	723	538	798	7,412.1	6,114.4
Weaving mills, cotton	212	211	269	143	192	3,972.0	4,431.2
Weaving mills, man-made fiber & silk	340	267	522	362	449	8,186.7	6,325.9
Weaving & finishing mills, wool	116	154	131	71	165	762.8	583.3
Narrow fabric mills	241	291	281	161	335	851.8	682.9
Knitting mills	na	2,318	2,332	1,300	2,617	10,993.6	9,470.0
Textile finishing, exc. wool	na	602	753	353	678	4,969.7	3,994.3
Floor covering mills	na	533	506	243	592	5,796.8	4,774.5
Misc. textile products	na	1,150	1,101	487	1,254	4,899.1	6,114.4
Apparel, other tex. prods.	na	23,754	24,313	10,899	26,505	53,406.1	40,245.1
Apparel		17,310	17,745	9,176	19,777	43,059.0	32,031.9
Other textile products	na	6,444	6,568	1,723	6,728	10,347.1	8,213.2

(p) preliminary
(r) revised

* Value of Industry Shipments includes shipments by all establishments classified within the industry, including both primary and secondary products, as well as the value of miscellaneous receipts (contract work, etc). and resales.

Source: U.S. Bureau of the Census, 1982 Census of Manufactures (MC82-SUM-1(P).

GENERAL INDUSTRY STATISTICS

Employment & Earnings

Current information on employment and earnings in industry classifications is developed by the Bureau of Labor Statistics, U.S. Department of Labor. This information differs from U.S. Census Bureau employment data as it is compiled using a different methodology and base period.

Employment in the textile industry has been hurt in recent years both by the surge in imports and by industry automation and improved productivity. Employment in the apparel industry has been adversely affected mainly by imports. An industry observer claims that 100,000 jobs are lost for every billion square yards of imported textiles in fabric or garment form.

The textile/apparel complex, overall, is very labor-intensive. Last year 87% of employees were classified as production workers compared with a U.S. total for all manufacturing of 69%. Within the complex, the apparel industry is the most labor-intensive and less able to automate or to adopt technological advances than is the textile mill products segment. Thus it is at a greater disadvantage in this way, perhaps, in countering the competition of imports, and more products look for relief in off-shore operations. As larger firms become more dominant in the apparel industry, technical knowledge and capital expenditures should gain; however, employment will continue to be adversely affected if the trend to establish manufacturing facilities abroad, or to sources abroad, accelerates.

Labor costs are a major problem in the competitive stance of U.S. textile mills. In a worldwide study by Werner International, a Brussels-based management group, released in 1984, it was reported that U.S. textile industry labor costs were the fifth highest in the world, compared with only the 11th highest in 1980.

In an effort to stem the tide in plant closing in the textile industry, unions representing many employees have been granting significant wage and benefit givebacks. On the other hand, 1985 seemed to indicate the beginning of a trend to the elimination of white-collar employees in the textile industry at a faster pace than blue-collar workers, which up to now has shown the sharpest losses in employment.

While gains were registered in both the textile industry and the apparel industry in average annual employment in 1984 compared with the 1983 averages, this was due entirely to a strong first half. By the end of the year there were 33,000 fewer workers in the textile mill products industry than were reported in December 1983 and apparel industry employment was down almost 16,000.

The long-term trend (1977-1984) in textile industry employment has been downward, at a compound annual rate of 3.9% according to the Department of Commerce (1985 U.S. Industrial Outlook). The downturn that started in the second half of 1984, due to a glut of imports, a drop in consumer demand, as well as technological improvements, has continued this year. In June 1985 employment in textiles hit a new low--the lowest since records were started by the BLS in 1939--averaging 699,000 for the month. This compares with a peak of 1,101,600 workers reported for March 1973 and 752,000 in June 1984.

GENERAL INDUSTRY STATISTICS

Employment & Earnings

Employment in the apparel industry was reported at 1,144,000 in June 1985, down from 1,152,000 in the previous month and 1,202,000 in June 1984, according to preliminary data. The lowest employment level for the industry was in December 1982 (1,134,000) at the depth of the recession. The highest level was registered in April 1973 (1,451,000).

The unemployment rate for the textile industry was 14.0% in April 1985 compared with 7.7% a year earlier; in apparel, it was 11.5% vs. 10.4%, according to the Bureau of Labor Statistics.

Despite the drop in employment levels, the fiber/textile/apparel complex still remains the top industrial employer in the U.S. in terms of production workers, although it is rapidly losing ground. It accounts for over two million employees, or over 10% of total employment in the U.S. manufacturing as of 1984 (down from one in eight a few years ago); and has a 13% share of all production workers in U.S. manufacturing plants. The apparel industry, alone, is the seventh largest manufacturing employer in the U.S.

Women represented 48% of all workers in textiles in 1984 and 80.5% of all apparel/related products industry employees. Putting it another way, the textile/apparel industries accounted for 21% of all women employed in U.S. manufacturing industries.

The high level of female employment, and the location of mills in the South where wage rates are lower, are factors in the relatively low hourly earnings in textiles and apparel. The average for hourly earnings of production workers in 1984 in textile mill products manufacturing was $6.18; in apparel manufacturing, $5.37. This compares with the average of $8.83 for production workers in all U.S. manufacturing; an average of $8.08 in nondurable goods manufacturing plants.

Trends in Production Worker Employment in the Fiber/Textile/Apparel Industrial Complex, 1977-1984
(Annual Averages in thousands)

Year	Total	Non-Cellulosic Fibers	Textile Mill Products	Apparel & Related Products
1977	1,989.1	67.4	792.3	1,129.4
1978	1,996.7	69.0	783.1	1,144.6
1979	1,958.5	70.8	770.9	1,116.8
1980	1,882.6	66.3	736.9	1,079.4
1981	1,830.7	58.7	712.5	1,059.5
1982	1,677.6	54.3	642.1	981.2
1983	1,676.3	50.9	641.1	984.3
1984	1,716.7	49.2	651.0	1,016.5

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

GENERAL INDUSTRY STATISTICS

Employment & Earnings

Employment & Earnings in Fiber/Textile/Apparel Industries, 1983, 1984

	Annual Average Employment (Thousands)		Production Workers			
			Avg. Weekly Earnings		Avg. Weekly Hours	
	1984	1983	1984	1983	1984	1983
Total	2,024.1	1,980.1	--	--	--	--
Organic fibers, noncellulosic*	69.8	72.5	$448.10	$422.35	41.8	41.9
Textile mill products industry	752.8	743.5	257.75	250.29	39.9	40.5
Selected components:						
Weaving mills, cotton	121.5	124.1	269.33	262.11	39.9	40.7
Weaving mills, man-made fibers	92.0	91.4	282.46	269.53	40.7	40.9
Weaving & finishing mills, wool	18.7	17.4	284.39	265.20	41.7	40.8
Knitting mills	206.8	204.3	224.79	220.56	38.1	38.9
Textile finishing, exc. wool	64.1	63.5	280.44	271.51	41.0	41.2
Yarn & thread mills	111.4	111.9	239.98	238.21	39.6	41.0
Apparel & other textile products	1,201.5	1,164.1	201.29	194.39	36.4	36.2
Selected components:						
Men's & boys' suits & coats	72.6	70.6	237.25	221.70	36.5	35.7
Men's & boys' furnishings	342.1	324.7	187.96	182.90	37.0	37.1
Women's outerwear	388.7	387.9	189.06	182.66	34.5	34.4
Women's & children's undergarments	87.7	84.6	186.58	178.49	36.8	36.5
Children's outerwear	62.8	59.6	180.68	172.32	36.5	35.9
Misc. apparel, accessories	47.3	46.5	201.00	192.39	37.5	36.3
Misc. fabricated tex. prods.	180.0	171.9	251.81	247.50	38.8	39.1

* Data not reported for cellulosic fiber producers.

Source: U.S. Department of Labor,
Bureau of Labor Statistics,
Employment & Earnings.

Industry Location

Employment in the textile industry has moved southward, and the greatest concentration of mills is in the Southeast, particularly in the Carolinas and Georgia. Combined, these states account for about 60% of the industry's employment.

Close to 60% of the apparel industry is concentrated in New York, California, Pennsylvania and New Jersey. The higher-fashion and tailored apparel items are particularly important in these states. The southern and southwestern states, however, are becoming increasingly important with the the growth in the markets for casual wear and sportswear.

GENERAL INDUSTRY STATISTICS

Industry Location

According to a study by Kayser-Roth (Women's Wear Daily, Feb. 1, 1983), the Middle Atlantic region had undergone a decline of 33% in apparel industry employment in the 1968-1983 period. Southern states, on the other hand, had increased apparel employment by 23% in this period. Projections based on this study are for another 50% decline in employment in the industry in the Middle Atlantic region by 1993, while Southern apparel industry employment will fall by 14%. Overall, a 20% drop in apparel industry employment was anticipated in this study.

Leading States for Specified Textile Industries, 1982

(Based on value added by manufacture)

	Mills		Employment		Value Added By Manufacture	
	No.	%	Thous.	%	Mil. $	%
Weaving/finishing mills, wool	131	100.0%	13.1	100.0%	$ 349.4	100.0%
Maine	12	9.2	2.1	16.0	64.8	18.5
Massachusetts	18	13.7	1.7	13.0	55.0	15.7
New Hampshire	6	4.6				
Fibers, non cellulosic, total	71	100.0	60.4	100.0	3,329.7	100.0
South Carolina	15	21.1	15.4	25.5	937.0	28.1
Virginia	8	11.3	12.3	20.4	814.3	24.5
North Carolina	13	18.3	11.5	19.0	600.6	18.0
Weaving mills, cotton	269	100.0	76.9	100.0	1,637.5	100.0
North Carolina	38	14.1	26.6	30.7	539.1	32.9
South Carolina	40	14.9	16.8	21.8	350.8	21.4
Georgia	35	13.0	17.1	22.3	309.2	18.9
Alabama	16	5.9	7.7	10.0	179.9	11.0
Weaving mills, man-made fiber, silk	522	100.0	140.8	100.0	3,486.7	100.0
South Carolina	110	21.1	52.3	37.1	1,277.4	36.6
North Carolina	84	16.1	34.6	24.6	836.8	24.0
Georgia	42	8.0	13.2	9.4	414.4	11.9

(continued)

GENERAL INDUSTRY STATISTICS

Industry Location

Leading States for Specified Textile Industries
(Based on value added by manufacture)
(continued)

	Mills		Employment		Value Added By Manufacture	
	No.	%	Thous.	%	Mil. $	%
Finishing mills, except wool	753	100.0%	58.0	100.0%	$1,590.2	100.0%
South Carolina	45	6.0	16.0	27.6	397.3	25.0
North Carolina	96	12.7	11.0	19.0	259.3	16.3
Massachusetts	45	6.0	5.2	9.0	158.1	9.9
New Jersey	72	9.6	2.7	4.7	139.3	8.8
Narrow fabric mill	281	100.0	17.5	100.0	464.7	100.0
Rhode Island	31	11.0	2.6	14.9	60.4	13.0
Pennsylvania	35	12.5	2.0	11.4	48.7	10.5
South Carolina	12	4.3	1.6	9.1	44.2	9.5
Circular knit fabrics	422	100.0	31.1	100.0	850.4	100.0
North Carolina	123	29.1	13.7	44.0	324.5	38.2
New York	105	24.9	2.7	8.7	79.5	9.3
New Jersey	47	11.1	1.7	5.5	42.9	5.0
Pennsylvania	40	9.5	1.9	6.1	42.3	5.0
Warp knit fabrics	207	100.0	19.0	100.0	533.9	100.0
North Carolina	44	21.2	8.1	42.6	215.3	40.3
Pennsylvania	19	9.2	1.8	9.5	84.0	15.7
New York	49	23.7	2.3	12.1	53.7	10.1

Note: For comparable data on apparel and other textile products, see specific Fact Files covering specific classifications of products.

Source: U.S. Bureau of the Census, Census of Manufactures
MC82-1-22A-22B-28B.

New York City

As of December 1984, the apparel and other finished textile products industry in New York City had 116,800 employees. This compares with an average of 140,200 in 1980.

The city's share of total apparel industry employment as of December last year was 10% and apparel manufacturing accounted for 27.2% of all the city's manufacturing employment as of December 1984.

Broadly defined to include apparel, accessories and toiletries, the fashion industry in New York City has been rated the third largest employer in the city, behind business services (advertising, marketing, management consulting) and wholesale trade. (*Women's Wear Daily*, May 12, 1983).

GENERAL INDUSTRY STATISTICS

Ranking of the Textile & Apparel Industries

The relative importance of the fiber/textile/apparel complex has diminished over the years, but it is still the nation's largest industrial employer. In terms of dollar volume, because of duplication in value of shipments within the complex--with shipments of some producers (fibers, for example) used in the manufacture of other products (fabrics)--overall rank is best determined on the basis of value added by manufacture within each segment of the complex.

In the following table, adjustments have been made in the composition of the textile apparel industries as defined by the government in order to arrive at a more precise measurement on an end-use basis. Specifically, man-made fibers have been taken from the chemical industry and are included in the textile mill products industry; knitwear has been transferred from textile mill products to apparel; household textiles and miscellaneous fabricated textiles have been separated from apparel and added to textiles. This has resulted in some unavoidable, but relatively small, duplication in the textile industry's value of shipments.

As this Fact File goes to the printer, data on value added by manufacture for major industry groups is not yet available from the 1982 census of manufactures, but should be released within a few months.

The Rank of Leading U.S. Industries Based on Value Added by Manufacture, 1981

Industry	Value Added by Manufacture**		Value of Industry Shipments	
	Bil. $	Rank	Bil. $	Rank
Machinery, except electric	$111.4	1	$201.5	4
Transportation equipment	82.9	2	205.2	3
Food & kindred products	80.8	3	272.1	1
Chemicals & allied products	80.0	4	180.5	5
Electric, electronic equipment	79.7	5	140.2	7
Fabricated metal products	61.6	6	123.7	8
Primary metal industries	49.6	7	141.6	6
Printing & publishing	49.4	8	77.3	10
Paper & allied products	32.4	9	80.2	9
Instruments & related products	31.5	10	48.3	14
Petroleum & coal products	26.7	11	224.1	2
Rubber & misc. plastic products	26.0	12	53.2	11
Apparel, incl. knitwear	25.6	13	49.8	13
Stone, clay & glass products	24.9	14	48.0	15
Textile mill products, incl. fibers & misc. fabricated textiles	19.4	15	50.3	12

** This measure of manufacturing activity is derived by subtracting the cost of materials, supplies, fuel, etc., and contract work from the value of product shipments, plus receipts for services. This calculation is adjusted for value of merchandising operations as well as inventories.

Source: Based on U.S. Bureau of the Census, Annual Survey of Manufactures, 1981, April 1983.

GENERAL INDUSTRY STATISTICS

Ranking of the Textile & Apparel Industries

The aggregate value added by manufacture among manufacturers classified in fiber/textiles/apparel amounted to $45.0 billion in 1981, ranking this industrial complex ninth among all U.S. manufacturing industries based on this measurement.

As previously noted, the fiber/textile/apparel industrial complex is the nation's largest employer in manufacturing. It accounts for over one out of 10 industrial employees. Although the complex comprises many small and medium-sized companies and relatively few giants, these giants--particularly in the textile industry--represent a large and growing share of shipments.

According to the American Textile Manufacturers Institute, there are approximately 5,000 textile firms (SIC 22) which do not include man-made fiber producers in the country. The largest 50 firms account for 50% of the industry's total output. Of the 6,192 plants classified in the industry in 1982, only 13.2% had 250 or more employees, but these large plants accounted for 65% of the total industry employment.

The apparel industry has traditionally been made-up of small, frequently family-operated companies with less than 100 employees, producing narrow product lines. The industry is, however, undergoing changes. There has been some consolidation among the publicly-held firms, and their share of output has been increasing. The capital and knowledge intensity of the industry has widened and product lines are expanding.

Of the 21,367 plants in the apparel and related textile products industry in 1982, 73% had under 50 employees, according to County Business Patterns (U.S. Census Bureau). However, there is a great turnover rate among the smaller manufacturers, and they are accounting for a decreasing share of the total industry pie. Competitive pressure from imports is forcing consolidation and greater efficiency. Off-shore production is another growing development affecting the composition of the apparel industry.

According to an apparel industry analysis by Kayser-Roth, in 1982 about 20% of total industry volume was in the hands of very large companies doing more than $100 million. These large companies accounted for only about 15% of all companies in the industry. It was estimated that by 1990, these same firms would control over 50% of apparel industry volume. (Women's Wear Daily, Feb. 1, 1983).

A detailed report on concentration ratios in manufacturing companies will be issued by the Census Bureau as a by-product of the census of manufactures, 1982, later this year.

INDUSTRY CONCENTRATION

Industry Concentration In Selected Textile Classifications Based on Employee-Size, 1982

	Mills		Employees		Value Added By Manufacture		Value of Shipments	
	No.	%	No.	%	Mil. $	%	Mil. $	%
Man-made fibers (non-cellulosic)								
Total	71	100.0	60.4	100.0	$3,329.7	100.0	$8,287.5	100.0
No. of employees								
Under 100	23	32.4	0.8	1.3	32.2	1.0	74.9	0.9
100 - 999	25	35.2	9.9	16.4	631.8	19.0	1,584.8	19.1
1,000 +	23	32.4	49.7	82.3	2,665.7	80.0	6,627.8	80.0
Weaving mills, cotton								
Total	269	100.0	76.9	100.0	1,637.5	100.0	3,972.0	100.0
No. of employees								
Under 100	164	61.0	2.4	3.1	66.3	4.0	146.4	3.7
100 - 999	92	34.2	41.8	54.4	949.0	58.0	2,212.2	55.7
1,000 +	13	4.8	32.7	42.5	622.2	38.0	1,613.4	40.6
Weaving mills, man-made fiber fabrics								
Total	522	100.0	140.8	100.0	3,486.7	100.0	8,186.3	100.0
No. of employees								
Under 100	246	47.1	5.3	3.8	162.3	4.7	363.8	4.4
100 - 999	257	49.2	100.2	71.2	2,587.8	74.2	5,933.9	72.5
1,000 +	19	3.8	35.3	25.1	736.6	21.1	1,888.6	23.1
Circular knit fabrics								
Total	422	100.0	31.1	100.0	850.4	100.0	2,538.8	100.0
No. of employees								
Under 100	327	77.5	7.4	23.8	188.4	22.1	543.7	21.4
100 - 999	92	21.8	20.4	65.6	500.5	58.9	1,660.5	65.4
1,000 - 2,499	3	0.7	3.3	10.6	161.4	19.0	334.6	13.2
Warp knit fabrics								
Total	207	100.0	19.0	100.0	533.9	100.0	1,465.8	100.0
No. of employees								
Under 100	158	76.3	4.5	23.7	116.9	21.9	304.0	20.7
100+	49	23.7	14.5	76.3	417.0	78.1	1,161.8	79.3
Finishing mills, man-made fiber fabrics								
Total	296	100.0	34.4	100.0	999.0	100.0	3,186.2	100.0
No. of employees								
Under 100	210	70.9	4.9	14.2	152.2	15.2	270.2	8.5
100 +	86	29.1	29.5	85.8	846.8	84.8	2,916.0	91.5

Source: U.S. Bureau of the Census,
1982 Census of Manufactures,
Industry Series, MC82-1.

FINANCIAL RESULTS

Textile Companies

Based upon an extensive sample survey, the Economic Surveys Division, Bureau of the Census, publishes quarterly aggregate statistics on the financial results of U.S. corporations, including those in the textile mill products industry.

The quarterly reports covering the textile industry are a clear indication of the problems faced by the industry in the second half of 1984. Imports of textile products poured in, consumer spending leveled off, and a massive build-up in inventories resulted at all levels, from retailers back to apparel manufacturers and to mills.

According to the Census Bureau analysis, the textile industry managed a 5.1% gain in sales for the year compared with 1983, while profits after taxes rose 4.2%.

Textile Mill Products Corporate Sales & Profits, 1983, 1984

	Year		1984 (Quarters)				1983
	1984	1983	4th	3rd	2nd	1st	4th
Sales (mil. $)	$50,426	47,993	12,961	12,334	12,679	12,452	12,422
Income: (mil. $)							
Before taxes	2,838	2,725	725	533	844	736	486
After taxes	1,666	1,599	396	349	508	413	287
Profits per $ of sales (cents)							
Before taxes	5.7	5.7	3.9	4.3	6.7	5.9	5.6
After taxes	3.3	3.3	2.3	2.8	4.0	3.3	3.1

Source: U.S. Bureau of the Census, *Quarterly Financial Report*.

Data on some of the leading mills indicates that some were able to chalk up substantial gains in profits in 1984. These were companies heavily involved in industrial fabrics which have not been adversely affected by imports. Apparel fabric producers fared worse in 1984 and are not expected to do much better in 1985. Knitting mills and yarn suppliers have been hurt both by imports and by the trend to wovens, especially the fashion switch from knitted sport shirts to wovens.

Some companies, such as Burlington and Lowenstein, are phasing out unproductive areas within the apparel fabric sector and redeploying efforts into the more productive home furnishings and industrial textile areas.

FINANCIAL RESULTS

Textile Companies

Leading Publicly-Owned Textile Companies: Sales & Profits, 1983, 1984
(Thousands of dollars)

Companies	Period Ending	SALES 1984	SALES 1983	% Chg.	PROFITS 1984	PROFITS 1983	% Chg.
Burlington	12/29*	$3,049,997	$2,383,135	+ 28.0%	$38,322	$111,501	- 65.5%
J.P. Stevens	11/3	2,144,183	1,926,137	+ 11.3	21,969	18,901	+ 16.2
West Point Pepperell	11/24	1,309,855	1,259,999	+ 4.0	46,625	57,207	- 18.5
Collins & Aikman	11/30*	1,024,167	856,417	+ 19.6	61,120	41,141	+ 48.6
Springs Industries	12/29	944,990	894,443	+ 5.6	36,071	37,051	- 2.6
Lowenstein	12/29	639,580	584,879	+ 9.3	30,636	22,178	+ 38.1
Fieldcrest	12/31	572,821	550,515	+ 4.0	4,143	15,060	- 72.5
Riegel Textiles	12/29*	405,994	413,556	- 1.8	(18,280)	8,297	--
Bibb Co.	12/29*	235,841	238,995	- 1.3	7,389	1,356	+444.9
Avondale	11/25*	282,602	319,231	- 11.5	9,979	11,426	- 12.7
Total		10,610,030	9,427,307	+ 12.5	237,974	324,118	- 26.6

* Fiscal periods have been adjusted to conform with the calendar year.

Note: Millikin is not listed as it is privately held but has sales of well over $2.5 billion a year.

Source: Daily News Record,
February 28, 1985.

According to an analysis of earnings in the textile industry by The Wall Street Journal (May 13, 1985) in the first quarter of 1985 depressed orders from cut-and-sew shops continued to plague the big weavers. Burlington Industries' net income for the quarter dropped 85% compared with the same 1984 period; West Point Pepperell's net plunged 94%. Composite results for nine textile companies showed net income for the quarter down 42%, and there appeared to be little sign of any resurgence in the second quarter. An improvement, however, is looked for by some industry analysts in the second half of 1985, as retail and apparel manufacturers' excess inventories are worked down, and growth in apparel imports moderates.

Apparel Companies

In contrast with the upbeat mood in the apparel industry in the last quarter of 1983, in the 1984 period, the apparel business was in the doldroms where earnings for most producers were down sharply. Problems related to overstocking at the retail level were expected to continue through the first half of 1985, but an improvement was expected in the second half of the year.

There were notable exceptions in the dismal earnings picture last year, particularly for apparel companies that had diversified into new product categories and new retail distribution channels. Liz Claiborne, which expanded its brands' acceptance by opening its own name shops in department stores, registered a 79.6% gain in profits in the fourth quarter and a whopping 87% gain for the entire year 1984.

FINANCIAL RESULTS

Apparel Companies

While profits for Levi Strauss were down 78.7% and sales off 8.9% in the 12 months ending Nov. 25, 1984, the first quarter earnings (period ending Feb. 24, 1985) rose 24.7% as sales of men's jeans improved and Levi's cost reduction measures began to take effect.

Leading Publicly-Owned Apparel Companies: Sales & Profits, 1983, 1984
(Thousands of dollars)

	Period	Sales			Profits		
Companies	Ending	1984	1983	% Chg.	1984	1983	% Chg.
Interco	11/30*	$2,668,791	$2,658,265	+ 0.4%	$87,969**	$104,977	-16.2%
Levi Strauss	11/25	2,513,536	2,731,273	- 8.0	41,387	194,523	-78.7
VF Corp.	12/31	1,167,356	1,100,956	+ 6.0	124,746	119,401	+ 4.5
Hartmarx	11/30	1,070,830	961,846	+11.3	41,735	37,615	+10.9
Cluett Peabody	12/31	949,265	858,910	+10.5	26,780	26,829	- 0.2
Phillips-Van Heusen	2/3	590,787	505,885	+16.8	15,298	17,262	-11.4
Warnaco	12/29	561,391	497,260	+12.9	20,474	28,342	-27.8
Oxford Inds.	11/30*	583,051	543,031	+ 7.4	16,223	25,743	-37.0
Manhattan Inds.	1/31	520,688	432,992	+20.2	1,124	11,547	-90.3
Liz Claiborne	12/29	391,272	228,722	+71.1	41,938	22,398	+87.2
Palm Beach	12/29	458,961	472,394	- 2.8	10,028	13,944	-28.1
Russ Togs	2/2	275,060	250,805	+ 9.7	11,113	12,114	- 8.3
Total		11,750,988	11,242,339	+ 4.5	438,815	614,695	-28.6

* Fiscal year adjusted to conform with the calendar year.
**Includes a $20 million charge associated with an asset redeployment plan.

Source: Daily News Record (April 11, 1985).

According to the Wall Street Journal analysis of apparel industry earnings in the first quarter of 1985 (WSJ, May 13, 1985), results were mixed, but a composite for 10 companies showed net income 31% below the level in the first quarter of 1984. Earnings fell 26% at Warnaco, 55% at Cluett Peabody, 86% at Oxford Industries and 38% at Phillips-Van Heusen. But profits rose 25% at Levi Strauss, due to better U.S. sales of men's jeans and to cost-cutting and profits were up 58% at Liz Claiborne. Expectations were for a sluggish second quarter, with improvement in the second half as retail inventories are reduced and retailers, hopefully, increase their buying from domestic resources.

According to an analysis by the Johnson Redbook staff, a 10% increase in apparel industry earnings is projected for 1986, due to better control of inventories and improved cost controls.

FIBER & YARN PRODUCTION/SHIPMENTS/CONSUMPTION

Fiber Production

In the entire year 1984, production by U.S. mills of man-made fibers, including cellulosic, noncellulosic and glass, totaled 9.486 billion pounds. This was 1.6% above the 9.336 billion pounds produced in 1983, but 9.6% below the peak of over 10 billion pounds reported by U.S. producers in 1979, according to the Textile Economics Bureau. The 1984 level was, however, 19% higher than the 1982 total of only 7.9 million pounds.

Capacity utilization for domestic man-made fiber producers averaged 81.2% for the year 1984, but has lagged well below that average in the first quarter of 1985. There was a pickup in March, when capacity utilization reached 77.9%, up from 74.6% in February. The gain was attributed to strengthening in the nylon carpet markets and in polyester industrial filament which benefitted by bigger demand for tire cord.

Polyester staple capacity utilization edged downward in March 1985 to 72.8% from 73.1% in February; but textile denier nylon improved to 81% from 78.3% in February. In general, the outlook for apparel fibers is not as bright as in other markets, particularly industrial uses, nonwovens and carpeting. Industry operating rates in apparel fibers are expected to remain in the lower 70s, while imports continue to erode the market and profits. Further cutbacks in U.S. apparel fiber capacity appear to be imminent.

DuPont, the major domestic producer of textile fibers, was reported to be optimistic about the markets for special areas such as Lycra spandex, nylon filament and fiber fill insulation in sportswear and skiwear, as well as the newly-introduced thermal plastic-coated yarns. However, DuPont's first quarter 1985 fiber sales were down 13%, and profits fell 52.3% compared with the first quarter 1984 results.

Man-Made Fiber Production by U.S. Producers, 1982-1984
(Millions of Pounds)

	1984	1983	1982	% Change 1984/1983
Man-made fiber, total	9,485.8	9,335.9	7,943.5	+ 1.6%
Cellulosic	620.1	630.3	584.4	- 1.6
Rayon yarn	32.3	26.5	33.2	+ 21.9
Industrial	20.2	15.3	20.8	+ 32.0
Textile	12.1	11.2	12.4	+ 8.0
Acetate yarn	198.2	227.6	195.2	- 12.9
Staple & tow				
Rayon	389.2	374.8	355.0	+ 3.8
Acetate	0.4	1.4	1.0	- 71.4
Noncellulosic	7,471.7	7,538.4	6,459.9	- 0.9
Yarn	3,524.4	3,567.8	3,057.4	- 1.2
Staple	3,947.3	3,970.6	3,402.5	- 0.6
Glass fiber	1,394.0	1,167.2	899.2	+ 19.4

Source: Textile Economics Bureau,
Textile Organon (March 1985).

FIBER & YARN PRODUCTION/SHIPMENTS/CONSUMPTION

Fiber Production

The extent to which U.S. production of most fibers has dwindled under pressures from imports, the strong U.S. dollar, as well as changes in the economy and in U.S. markets is seen in the drop from production peaks represented by 1984 levels in specific fibers. The trend is sharply down, although there have been fluctuations, up and down, between the peak year and 1984 levels.

	Peak Year Reported		% Change
Fiber	Year	Mil. Pounds	1984/Peak Year
Rayon yarn	1965	433.8	- 92.5%
Acetate yarn	1970	463.2	- 57.2
Rayon staple	1969	389.2	- 48.7
Rayon acetate	1963/64/65	60.0	- 99.3
Noncellulosic yarn	1979	4,154.3	- 15.2
Noncellulosic staple	1979	4,282.3	- 7.8
Glass fiber	1984	1,394.0	--

Source: Based on reports compiled by the Textile Economics Bureau.

Fiber Shipments

While production of man-made fibers rose slightly in 1984, shipments were off 1.4% compared with 1983, although they were 13.5% ahead of the 1982 total.

The trend in shipments by type of fiber was mixed in 1984. Industrial types showed increases, but shipments of textile nylon dropped 7.4% compared with 1983; textile polyester was down 16.2% due to oversupplied and import-filled apparel market. Nylon staple shipments dropped almost 9% as the carpet market softened in the second half of 1984.

Man-Made Fiber Shipments By U.S. Producers, 1982-1984
(Millions of pounds)

	1984	1983	1982	% Change 1984/1983
Total man-made fibers*	8,017.7	8,129.1	7,064.0	- 1.4%
Yarn + monofilaments				
Acetate	198.3	225.8	198.8	- 12.2
Nylon**				
Industrial	375.1	318.1	324.5	+ 17.9
Low denier industrial	34.0	35.5	29.5	- 4.2
Carpet	794.9	762.6	582.1	+ 4.2
Textile	353.0	381.4	331.6	- 7.4
Polyester				
Industrial	313.1	307.6	288.0	+ 1.8
Low denier industrial	24.8	26.0	22.4	- 4.6
Textile	860.2	1,027.1	927.1	- 16.2
Olefin	743.7	714.2	592.3	+ 4.1

(continued)

FIBER & YARN PRODUCTION/SHPMENTS/CONSUMPTION

Fiber Shipments

Man-Made Fiber Shipments By U.S. Producers, 1982-1984
(Millions of pounds)
(continued)

	1984	1983	1982	% Change 1984/1983
Staple + Tow + Fiberfill				
Rayon	384.0	377.4	360.2	+ 1.7
Nylon*	831.3	911.2	689.9	- 8.8
Acrylic + Modacrylic	666.2	654.7	632.2	+ 1.7
Polyester	2,192.4	2,197.8	1,941.6	- 0.2
Olefin + Vinyon	246.7	189.7	143.8	+ 30.0

* Data include rayon yarn, saran, spandex, acetate staple and tow.
** Aramid is not included in Nylon data for 1983 and 1984, but is included in 1982.

Source: Textile Economics Bureau, Textile Organon (January 1985).

In the first 2 months of 1985, shipments of man-made fibers covered in the above table were 2.3% below the total in the same 1984 period. Stocks at the end of February were up 4.8% (in poundage) compared with the end-of-February 1984 stocks.

Mill Consumption of Fiber

In 1984, U.S. mill consumption of man-made fibers fell nearly 3%; cotton consumption declined, dropping 4.5%, while wool made a slight gain.

The most significant drop in mill consumption of man-made fibers was in polyester, which dropped 8.5%. However, man-made fibers increased its share of mill consumption, rising to 73.7%, while cotton fell to 24.8% and wool share remained unchanged at 1.5%. (Consumption of silk and flax are not included in the mill consumption data).

U.S. Mill Consumption of Fibers In Textile End Uses, 1980-1984
(Billions of pounds)

	1984	1983	1982	1981	1980
Total	10.8	11.1	9.3	10.7	11.3
Rayon	0.4	0.4	0.3	0.5	0.5
Acetate*	0.2	0.2	0.2	0.2	0.3
Nylon**	2.4	2.4	1.9	2.2	2.3
Polyester	3.2	3.5	2.9	3.5	3.5
Acrylic***	0.5	0.5	0.5	0.5	0.6
Olefin	1.0	0.9	0.8	0.8	0.7
Glass#	0.2	0.2	0.1	0.1	0.2
Cotton	2.7	2.8	2.5	2.7	3.1
Wool	0.2	0.2	0.1	0.2	0.1

* Includes triacetate. Cigarette tow is excluded.
** Includes aramid for all years but 1983 and 1984.
*** Includes modacrylic.
# Includes only glass fibers for textile end uses.

Source: Textile Economics Bureau, Textile Organon (March 1985).

FIBER & YARN PRODUCTION/SHIPMENTS/CONSUMPTION

Total Supply of Fibers

Mill consumption of raw wool for 1984, based on Department of Agriculture reports, totaled 140.3 million pounds, clean basis, which was 1.6% above the 1983 total. While overall consumer consumption of wool in the U.S., including imported products, is slowing down, it reached 332 million pounds in 1984, up 12% compared with 1983. Imports make up the difference between this total and U.S. mill consumption. In 1984, imported wool apparel and fabric soared 44% over 1983.

Despite restrictive cotton acreage reduction programs in 1984 and 1985, stocks of cotton continued to rise because of record yields in 1984, and in the face of declines in both mill use and exports. The U.S. Department of Agriculture projected mill use for the 1984/85 season at 5.3 million bales, down from over 5.8 million in the 1983/84 season and 7.1 million bales in the 1971/72 season. Mill use may fall to about 5 million bales during 1985/86.

Cotton Textile Trade, Mill Use & Domestic Consumption, 1982-1984
(1,000 480-lb. bales)

	Mill use	Textile Trade Imports	Textile Trade Exports	Textile Trade Deficit	Domestic Consumption	Imports Share of Domestic Consump.
1982	5,183.1	1,869.1	527.8	1,341.3	6,524.5	28.6%
1983	5,824.3	2,336.1	457.5	1,878.6	7,702.8	30.3
1984(e)	5,300.0	3,000.0	400.0	2,600.0	8,100.0	37.0

(e) estimated

Source: U.S. Department of Agriculture, Cotton and Wool Outlook & Situation Report.

Total Supply of Noncellulosic Fibers (Nylon, Olefin, Polyester) 1982-1984
(Millions of pounds)

	1984	1983	1982	% Change 1984/1983
Noncellulosic				
Yarn + monofilament				
Production	3,524.4	3,567.8	3,040.4	- 1.2%
Shipments - domestic	3,313.5	3,385.4	2,877.4	- 2.1
export	184.1	187.3	220.2	- 1.7
Imports				
Total available supply, including stocks at start of year	3,417.5	3,443.3	2,907.2	- .7
Staple + Tow				
Production	3,947.3	1,035.6	3,402.5	+281.2
Shipments - domestic	3,494.2	3,671.9	3,037.6	- 4.8
exports	442.4	281.5	369.9	+ 57.2
Imports	131.1	101.6	51.2	+ 29.0
Total available supply, including stocks at start of year	3,625.3	3,773.5	3,088.8	- 3.9

Source: Textile Economics Bureau, Textile Organon (Feb. 1985).

FIBER & YARN PRODUCTION/SHIPMENTS/CONSUMPTION

Total Supply of Fibers

Imports of noncellulosic yarns reached 104 million pounds in 1984, up 73% compared with 1983 and more than triple the 1982 total. Imports of man-made staple fiber totaled 131.1 million pounds last year, 29% above the 1983 total and over one and a half times the 1982 imports.

The balance of trade in man-made fibers plus manufacturers dropped to a net-import balance of 325 million pounds in 1984--the highest level since 1972, according to the Textile Economics Bureau.

Price and import pressures are responsible for significant cutbacks in production and shipments by U.S. producers of rayon staple. In the past year some 6 to 8 million pounds were imported into the U.S. and sold for as much as ten cents less on the pound than U.S. rayon, which, in turn, is not selling at a very low price level. Rayon prices are tied to cotton and polyester prices and the low level now reflects the abundant cotton crop and excess industry capacity. U.S. production of rayon staple has declined from 697 million pounds annually in 1973 to 389 pounds in 1984 (384 pounds were shipped). Nevertheless, large producers, such as American Enka, plan to invest in new production equipment to become more cost-efficient and competitive with imports and other fibers.

Raw Fiber Equipment of Imported & Exported Manufactured Products By Fiber Type & Resulting Trade Balance, 1983, 1984
(Millions of pounds)

	1984	1983	% Change 1984/1983
Man-made Fiber			
Imports*	1,342.0	1,069.4	+ 25.5%
Exports*	488.0	460.7	+ 5.9
Balance, total	854.1	608.7	+ 40.3
Semi-manufactured products	50.3	12.1	+315.7
Manufactured products	803.7	596.6	+ 34.7
Cotton			
Imports*	1,464.8	1,135.4	÷ 29.0
Exports*	204.6	219.6	- 6.8
Balance, total	1,260.2	915.8	+ 37.6
Semi-manufactured products	420.9	297.8	+ 41.3
Manufactured products	839.3	618.0	+ 35.8
Wool			
Imports*	189.4	131.9	+ 43.6
Exports*	15.1	18.9	- 20.1
Balance, total	174.3	113.0	+ 54.2
Semi-manufactured products	51.2	30.6	+ 67.3
Manufactured products	123.1	82.4	+ 49.4

* Includes both manufactured and semi-manufactured products.

Source: Based on Textile Economics Bureau, Textile Organon (March 1985).

FIBER & YARN PRODUCTION/SHIPMENTS/CONSUMPTION

Consumption of Fibers

Consumption of all fibers by U.S. mills in 1984 amounted to 10.8 billion pounds, 3% below the 1983 total, according to the U.S. Department of Agriculture. Cotton use was 2.7 billion pounds, down 4.5%, and noncellulosic fibers, at 7.4 billion, declined more than 2%. U.S. mill consumption of raw wool (scoured basis) included 130.5 million pounds of apparel wool (2.9% above the 1983 total), and 9.8 million pounds of carpet wool (13.9% below the 1983 total).

An important factor in the downturn in mill consumption of fibers was the large quantity of imported textile products. Expressed in terms of raw fiber, imports averaged 20% of mill fiber consumption in 1982 and 1983 and 28% in 1984. Imports increased about 29% from a year earlier in both 1983 and 1984.

Total domestic consumption of fibers, including imported goods, amounted to 13.059 billion pounds, up 2.5% compared with 1983, according to the Textile Economics Bureau. Imports of man-made fiber manufactures gained over 25%; imports of cotton products rose 29%, and wool imports increased by 44%. Total domestic consumption by type of fiber in 1984 was reported as follows in billions of pounds: man-made, 8.792/8.763; cotton, 3.929/3.711; wool, .0337/.0275.

A profile of domestic consumption of fibers reported by the Department of Agriculture for 1983 compared with 1981 and 1982 follows.

Domestic Consumption of Fibers, 1981-1983
Total (Millions of pounds) & Per Capita (Pounds)

	1983			1982			1981		
	Total	% of Fibers	Per Capita*	Total	% of Fibers	Per Capita*	Total	% of Fibers	Per Capita*
All fibers**	13,555.5	100.0	57.9	11,136.7	100.0	48.0	12,264.1	100.0	53.4
Cotton	3,697.4	27.3	15.8	3,131.7	28.1	13.5	3,310.1	27.0	14.4
Wool	273.3	2.0	1.2	215.1	1.9	0.9	239.9	2.0	1.0
Rayon, acetate	618.5	4.6	2.6	542.5	4.9	2.3	724.8	5.9	3.1
Noncellulosic man-made fibers	8,966.3	66.1	38.3	7,247.3	65.1	31.2	7,989.3	65.1	34.8

* Per capita consumption is based on total U.S. population including Armed Forces overseas as of July 1.

** Flax and silk are not included. Mill consumption of flax and silk was reported at 6.7 million pounds in 1983, 10.4 million in 1982 and 5.5 million in 1981.

"Domestic" consumption refers to mill consumption plus an adjustment for the raw fiber equivalent of net U.S. trade in textile manufactures. Rayon and acetate data and non-cellulosic man-made fiber data include fiber waste.

Source: U.S. Department of Agriculture,
Cotton & Wool Outlook & Situation (May 1984).

FIBER & YARN PRODUCTION/SHIPMENTS/CONSUMPTION

Consumption of Fibers

A drop in fiber consumption in apparel markets in the years ahead is generally anticipated. In a presentation on fiber consumption trends at an Industrial Fabric Seminar sponsored by Clemson University in August 1984, Ken Rosett/ Associates presented the following chart, pointing out that while apparel constituted 38.2% of the fiber market in 1981,it was expected to fall to only 28.4% by 1993. On the other hand, fiber comsumption in home furnishings and floor coverings was expected to increase from 28.8% in 1981 to 32.7% in 1993. Industrial uses will increase according to the projections--particularly in non-wovens. However, the auto market is expected to shrink because new car models are getting smaller.

Textile Fiber Market Share, 1981-1984, Projected 1988, 1993

	1981	1982	1983	1984(e)	1988(p)	1993(p)
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Apparel	38.2	37.4	36.1	36.4	33.2	28.4
Home furnishings	13.6	12.9	13.5	12.8	13.6	14.6
Floor coverings	14.2	14.4	16.1	14.9	16.3	18.1
Industrial	15.3	15.5	15.6	15.5	15.8	16.4
Tires	5.1	5.5	5.1	5.7	5.8	5.9
Other	13.6	14.3	13.6	14.7	15.3	16.6

(e) estimated based on first half of 1984.
(p) projected

Source: America's Textiles (December 1984).

Yarns

According to latest available Census Bureau data covering 1983, production of spun yarns in the U.S. totaled 6,062.0 million pounds, increasing 14.7% from 1982. Increases for spun yarn production by end use were registered at 13.3% for weaving yarns, 11.9% for machine knitting yarns, 29.8% for carpet and rug yarns, 3.2% for hand knitting yarns and 4.0% for cordage and twine yarns. Tufting yarns dropped 44.6%; thread yarn dropped 0.9%

Textured yarn production in the U.S. amounted to 2,316.0 million pounds in 1983, an increase of 8.4% from 1982. Carpet and rug yarns accounted for half of the total, and were up 30% over 1972. Knitting yarns (28% of the total) declined 12.1%.

FIBER & YARN PRODUCTION/SHIPMENTS/CONSUMPTION

Yarns

Production of Specified Textured & Spun Yarns by Fiber & Method of Distribution, 1982, 1983

(Millions of pounds)

	1983	1982(r)	% Change 1983/1982
Textured, crimped, or bulked filament yarns, total	2,316.0	2,137.1	+ 8.4%
Fiber:			
Nylon	1,240.5	998.7	+ 24.2
Polyester	880.4	962.3	- 8.5
Rayon, acetate, other	195.0	176.1	+ 10.7
Distribution:			
For sale	1,633.3	1,584.1	+ 3.1
For own use	604.4	475.3	+ 27.2
On commission	78.3	77.8	+ 0.6
Spun yarns, total**	6,602.0	5,284.3	+ 24.9
Weaving yarns exc. carpet	3,682.0	3,249.0	+ 13.3
Fiber:			
Cotton/chiefly cotton	1,706.8	1,487.2	+ 14.8
Wool/chiefly wool	96.4	87.8	+ 9.8
Rayon &/or acetate (chiefly)	157.2	131.6	+ 19.4
Noncellulosic fibers, total	1,719.0	1,478.0	+ 16.3
100% acrylic/modacrylic	59.7	56.2	+ 6.2
100% polyester	199.9	160.0	+ 24.9
Blends:			
Chiefly polyester-			
Containing cotton	1,200.6	1,123.5	+ 6.9
Containing other fibers	*	*	--
Chiefly acrylic/modacrylic	23.5	19.1	+ 23.0
100% nylon	30.2	26.5	+ 14.0
Blends, chiefly nylon	17.0	11.6	+ 46.6
Other spun yarns, 100% one fiber	30.2	22.4	+ 34.8
Sisal, hemp, jute, etc.	2.7	1.9	+ 42.1
Distribution of weaving yarns			
For sale	484.0	380.0	+ 27.4
For own use	3,188.1	2,851.8	+ 11.8
On commission	10.0	17.1	- 41.5
Carpet & Rug yarns	920.5	709.4	+ 29.8
Spun machine knitting yarn (exc. carpet), total	1,202.3	1,074.0	+ 11.9
Fiber:			
Cotton/chiefly cotton	538.8	474.7	+ 13.5
Wool/chiefly wool	22.5	18.7	+ 20.3
Spun rayon/acetate (chiefly)	*	*	--
Spun noncellulosic	637.9	576.2	+ 10.7
Principal types:			
100% acrylic/modacrylic	154.1	137.2	+ 12.3
Polyester/cotton blends	303.0	255.6	+ 18.5

(continued)

Yarns

Production of Specified Textured & Spun Yarns by Fiber & Method of Distribution, 1982, 1983
(Millions of pounds)
(continued)

	1983	1982(r)	% Change 1983/1982
Distribution:			
For sale	892.9	767.6	+ 16.3
For own use	300.2	299.0	+ 0.4
On commission	9.1	7.4	+ 23.0

(r) revised

* Information withheld. Involves consumption of 2.5 million pounds or less of any one miscellaneous fiber.

** The 1983 total includes 257.2 million pounds of other spun yarns (i.e. hand knitting, thread, cordage, twine, etc.).

Source U.S. Bureau of the Census,
Current Industrial Reports MA22F.

Value of Reported Domestic Yarn Shipments, 1977, 1982, 1983
(Including Interplant Transfers)
(Millions of dollars)

	1983	1982	1977
Spun yarn			
Cotton (carded & combed)	$2,345.3	$2,054.7	$1,567.7
Rayon &/or acetate	163.2	143.5	233.5
Polyester	2,090.8	1,816.6	728.3
Noncellulosic, exc. polyester & silk	1,323.0	1,040.4	1,034.3
Wool, except carpet	120.2	106.3	177.6
Wool, carpet	11.8	12.7	37.4
Textured, crimped or bulked filament yarns	2,316.0	2,214.4	1,220.7

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982
Current Industrial Reports (MA22F).

FIBER & YARN PRODUCTION/SHIPMENTS/CONSUMPTION

Summary of Production, Imports & Exports of Yarns, 1983
(Quantity in millions of pounds, value in millions of dollars)

	Production	U.S. Exports		Imports For Consumption		
	Quantity*	Quantity	Value	Quantity	Value	% to Apparent Consump.** (Based on quantity)
Spun yarns						
Cotton	2,345.3	12.6	$28.4	26.1	$36.1	1.1%
Wool	132.0	0.2	1.4	7.5	47.0	5.4
Man-made:						
Cellulosic	163.2	0.3	0.8	1.0	2.2	0.6
Noncellulosic	3,413.8	30.6	65.1	31.0	60.6	0.9
All other fibers	7.8	1.6	8.7	20.6	17.1	77.1
Textured yarns						
Cellulosic	0.7	0.2	0.5	0.3	0.3	34.6
Noncellulosic	2,315.2	116.7	154.9	23.1	37.3	1.0

* Value not reported.

** Apparent consumption is equal to domestic production plus U.S. imports minus exports.

Source: U.S. Bureau of the Census,
Current Industrial Reports MA22F.

In spite of a great influx of yarns from low-labor cost areas, including Hong Kong and the Pacific Basin countries, the U.S. yarn market was reported to be picking up in the first quarter of 1985, due to the consumer demand for sweaters and knit tops.

Yarns Consumed In Fabric Consumption

Yarns Consumed in Broadwoven Fabric Mills, 1982-1984
(Millions of pounds)

	1984	1983	1982	% Change 1984/1982
Yarns consumed, total	4,594.8	4,583.2	2,884.0	+ 59.3%
100% filament	1,546.6	1,446.5	1,184.0	+ 30.6
Rayon, acetate, triacetate	150.5	151.3	87.2	+ 72.6
Polyester	486.0	526.1	447.8	+ 8.5
Saran & olefin & all other filament yarns n.e.c.	320.0	341.6	275.5	+ 19.8
Glass	168.0	153.6	130.8	+ 28.5
Nylon	309.1	273.9	242.6	+ 27.4

(continued)

FIBER & YARN PRODUCTION/SHIPMENTS/CONSUMPTION

Yarns Consumed In Fabric Production

Yarns Consumed In Broadwoven Fabric Mills, 1982-1984

(Millions of pounds)
(continued)

	1984	1983	1982	% Change 1984/1982
Spun yarns	2,934.6	3,010.6	2,609.0	+ 12.5%
100% cotton	1,213.7	1,281.9	1,102.5	+ 10.1
Carded	1,157.0	1,221.2	1,056.6	+ 9.5
Combed	56.7	60.6	45.9	+ 23.5
100% acrylic	39.0	37.0	24.5	+ 59.2
100% polyester	62.6	50.3	50.8	+ 23.2
100% rayon & acetate, rayon &/or acetate/cotton blends*	86.1	84.7	65.7	+ 31.0
Polyester/cotton blends*	1,217.2	1,249.7	1,086.7	+ 12.0
Polyester/wool blends*	41.5	23.5	25.3	+ 64.0
Polyester/rayon blends*	128.4	136.2	134.4	- 4.5
All other yarns	113.6	126.1	90.9	+ 25.0

n.e.c. not elsewhere classified
* regardless of blend level

Source: U.S. Bureau of the Census,
Current Industrial Reports (MQ22T).

Yarns Consumed in the Production of Knit Fabrics, 1981-1983

(Millions of pounds)

	1983	1982	1981
Yarns consumed, total	1,511.8	1,370.3	1,478.9
Sliver, all fibers	69.9	65.1	67.3
Filament yarns, total	518.0	483.9	577.8
Flat:			
Polyester	69.8	68.2	80.4
Acetate & triacetate	75.9	75.7	92.4
All other yarns	65.0	51.5	70.1
Texturized:			
Polyester	199.6	193.3	224.5
Nylon	93.5	83.6	94.6
All other yarns	14.1	11.6	15.8
Spun yarns, total	817.1	737.8	744.7
100% cotton	211.5	215.6	214.8
All acrylic & acrylic blends	213.2	191.2	197.4
Polyester & cotton blends	392.4	331.1	332.5
All other yarns	79.5	68.5	61.9
Yarns consumed, type not specified	27.4	25.0	27.2

Source: U.S. Bureau of the Census,
Current Industrial Reports, MA22K.

FIBER & YARN PRODUCTION/SHIPMENTS/CONSUMPTION

Yarns Consumed In Fabric Production

Yarns & Thread Consumed in the Production of Narrow Fabrics
(Millions of pounds)

	1983	1982	1981
Yarns:			
Cotton	29.1	26.1	31.1
Filament rayon & acetate	10.8	10.4	na
Filament nylon	30.7	30.4	32.4
Filament glass	3.3	3.6	3.9
Polyester	38.3	28.8	na
Bare rubber thread	14.1	12.1	14.0
Bare spandex thread	0.9	0.8	0.7
Covered rubber or spandex thread	1.4	1.4	1.6
Spun rayon yarns	0.8	0.9	1.5
Saran & olefin	5.9	5.8	5.8
Other yarns	19.8	18.5	35.1

na - not available

Source: U.S. Bureau of the Census,
Current Industrial Reports, MA22G.

PRODUCTION OF TEXTILES

The Board of Governors, Federal Reserve System, compiles monthly indexes of production in the U.S. by industry type. The annual averages trace the pattern in the strong revival in the textile industry in 1983, recovering from 1982 recession lows; then the slowdown in the second half of 1984, which followed the accumulation of goods in the distribution pipeline and competition from imports.

Yarns were helped by demand in the industrial sector and in carpeting, which held up fairly well in 1984. Fabrics which were principally man-made fibers managed a gain, but most other segments of the industry lagged behind 1983 in output.

The general decline in production has continued in 1985. The Federal Reserve Board reported that capacity utilization in textile mills in April 1985 was at 77.5%, continuing the steady decline from the high of 85% reported in April 1984. The FRB production index (1977=100) for textile mill products registered 98.5 for May 1985 (seasonally adjusted) which was about 6% below the year-earlier comparison.

Domestic mills continue to be the main source of supply for the non-designer/upper-moderate and better-price apparel producers--particularly sportswear and basics, but designers prefer foreign fabrics and are taking advantage of worldwide sourcing options which are expanding rapidly. They seek the exclusivity and small quantities which are not available through American mills, as well as buying fabric in the Orient and other areas where their apparel is to be produced.

PRODUCTION OF TEXTILES

American mills are stepping up efforts to meet this competition by installing new equipment and speeding up delivery schedules, while cutting costs. In the past 10 years, the U.S. textile industry has spent about $13 billion in plant and equipment modernization. The Catch 22 is that plants with new high technology and high investments in the U.S. must maintain a very high level of mill operating hours to justify these investments and keep high depreciation charges within bounds. They may not be in a favorable position to supply exclusive, small orders for the upper end of the market, or respond quickly to novelties and fashion changes.

The FRB has recently announced a revision in this index of industrial production, back to 1967, moving the reference year from 1967 to 1977=100. The following indexes are the "old" series, based on 1967.

Annual Average Indexes of Production, 1981-1984
(1967=100)

	1984	1983	1982	1981	% Change 1984/1983
All U.S. manufacturing*	164.8	148.2	137.6	150.4	+ 11.2%
Man-made fibers	234.5	236.2	204.2	254.3	- 0.7
Textile mill products	138.6	140.8	124.5	135.7	- 1.6
Fabrics (woven)	101.2	102.4	90.9	102.7	- 1.2
Cotton	64.8	67.7	60.2	66.1	- 4.3
Man-made	197.1	193.6	172.1	nr	+ 1.8
Wool	50.7	55.0	47.7	nr	- 7.8
Knit goods	186.1	187.2	172.3	186.6	- 0.6
Hosiery	236.7	237.7	212.5	229.0	- 0.4
Knit garments	160.4	161.6	151.9	165.1	- 0.7
Fabric finishing	121.4	121.5	117.7	141.8	- 0.1
Yarn & misc. textiles	144.2	139.5	116.6	121.5	+ 3.4
Carpeting	178.2	223.9	182.0	186.2	- 20.4

nr = not reported.
* All manufacturing, including both durable and nondurable manufactures.

Note: The apparel production index is not currently reported by the FRB due to a lack of reliable data.

Source: Board of Governors, Federal Reserve System (G.12.3).

The Bureau of the Census, Department of Commerce, compiles current information, based on a quarterly survey among manufacturers, of total U.S. production of broad woven fabrics (over 12 inches in width), a monthly sample survey of finishing plants (broadwoven fabrics), and annual surveys covering manufacturers of woven narrow fabrics and knit fabric mills.

Preliminary information for 1984 on U.S. production of broad woven fabrics shows a total of over 16 billion square yards, 17.1% ahead of the 1982 total and slightly (1.4%) over the 1983 total reported at 15.8 billion square yards.

The slight 1984 gain was due to a strong 1st quarter. Production of broad woven fabrics by U.S. manufacturers was at 4,194.8 million square yards in the first quarter but dropped to 3,826.3 million square yards in the 4th quarter.

PRODUCTION OF TEXTILES

Compared with 1983 production, cotton broad woven fabric (grey goods) output was down 5.1%. Man-made fiber goods did better, managing a 3.3% gain. Output of woolen and worsted fabrics gained 10.1%; silk, paper and specialty fabrics rose 44%. As previously noted, the tire market has been strong and production of tire cord and fabrics in 1984 gained 15.3% over the 1983 total.

Summary of Production Data For Broad Woven Gray Fabrics, 1982-1984
Total By Class of Fabric & Selected Major Types
(Millions of square yards)

	1984(p)	1983	1982(r)	% Change 1984/1982
Broad woven fabrics, total	16,010.5	15,796.4	13,675.0	+ 17.1%
By class of fabric				
Cotton & chiefly cotton broad woven goods*	3,977.6	4,192.2	3,794.4	+ 4.8
Duck & allied fabrics	118.3	99.0	85.9	+ 37.7
Sheeting & allied coarse & medium yarn fabrics	528.9	543.7	510.5	+ 3.6
Print cloth yarn fabrics	1,718.7	1,696.9	1,518.1	+ 13.2
Carded colored yarn fabrics:*				
Denim (clothing), incl. sport denims	589.9	698.9	543.9	+ 10.1
Toweling, washcloth, dishcloth fabrics	376.0	464.6	467.4	- 19.5
Blanketing & other napped fabrics	94.2	81.0	70.5	+ 33.6
Upholstery & tapestry fabrics	29.1	20.2	20.2	+ 44.1
Corduroys	231.5	264.6	264.6	- 12.5
Man-made fiber or chiefly man-made fiber broad woven goods*	11,640.1	11,269.9	9,590.5	+ 21.4
100% filament yarn fabrics, total	4,967.6	4,472.8	3,669.6	+ 35.4
Chiefly rayon and/or acetate	524.5	D	D	--
Chiefly nylon fabrics	549.9	485.1	419.2	+ 31.2
All other filament yarn fabrics	3,893.2	D	D	--
100% spun yarn fabrics, total	5,578.7	5,702.1	5,067.6	+ 10.1
Rayon &/or acetate fabrics	102.1	86.9	94.1	+ 8.5
Polyester/cotton blends	4,331.1	4,417.4	3,946.7	+ 9.7
All other spun yarn fabrics	1,145.5	1,197.8	1,026.8	+ 11.6
Combinations & mixtures of filament & spun yarn fabrics	1,093.7	1,094.9	853.3	+ 28.2
Silk, paper & other specialty fabrics*	234.8	190.8	169.9	+ 38.2
Silk fabrics	nr	1.2	D	--
Upholstery & tapestry fabrics	nr	158.8	127.0	--
Woolen & worsted fabrics, exc. felts	158.0	143.5	121.1	+ 30.5
Men's, boys' apparel fabrics	60.0	58.6	55.0	+ 9.1
Women's, children's apparel fabrics	88.1	79.3	60.5	+ 45.6
Nonapparel fabrics	9.9	5.6	5.7	+ 73.7
Tire cord & fabrics (millions of pounds)	625.7	542.7	498.1	+ 25.6

(r) revised (p) preliminary (nr) not reported
* Includes fabrics not separately listed.
(D) Withheld to avoid disclosure of figures for individual companies.

Source: U.S. Bureau of the Census, *Current Industrial Reports* (MQ22T).

PRODUCTION OF TEXTILES

Finished Broad Woven Fabrics

Overall, the Nation's finishing plants and textile mills bleached, dyed or printed 7,154.4 million linear yards of cotton, man-made fiber and silk fabrics in 1984, according to preliminary estimates based on Census Bureau monthly reports. This was 6.8% above the 1983 total, but slightly (+0.5%) over the 1982 total.

All types of finished fabrics showed a decline compared with 1984 with the exception of printed cotton fabrics (+8.6%), which have enjoyed a healthy market due to consumer demand for printed fabrics in home textiles--sheets, towels, kitchen textiles, etc. Other growing markets for prints include uniforms for fast food operations.

Quantity of Broad Woven Fabrics Finished, 1982-1984
(Millions of linear yards)

	1984(p)	1983	1982	% Change 1984/83	% Change 1984/82
Finished broadwoven fabrics, total*	7,154.4	7,676.6	7,118.3	- 6.8%	+ 0.5%
Cotton (chiefly cotton)	2,662.9	2,750.3	2,519.5	- 3.2	+ 5.7
White	1,264.9	1,290.5	1,220.7	- 2.0	+ 3.6
Plain colors	913.7	1,013.7	861.3	- 9.9	+ 6.1
Prints	484.3	446.0	437.5	+ 8.6	+ 10.7
Man-made & silk (chiefly man-made or silk)	4,491.5	4,926.3	4,598.8	- 8.8	- 2.3
White	3,484.3	1,028.4	1,088.2	- 10.7	- 2.3
Plain colors		2,873.2	2,479.8		
Prints	1,007.2	1,024.7	1,030.8	- 1.7	- 2.3

(p) preliminary

* Based on a survey covering all known bleachers, dyers and printers of cotton and man-made fiber broad woven fabrics (about 350 establishments) except very small firms (generally less than five employees). Does not include finished fabrics not bleached, dyed or printed at the reporting establishment (flameproofed, sanforized, mildewproofed, mercerized, embossed, flocked, moired, plissed, schreinerized, etc.) which were reported as 77 million finished linear yards of cotton fabric for 1983, 35 million for 1982, and 528 million finished linear yards of manmade fabrics for 1983 and 300 million yards for 1982.

Source: U.S. Bureau of the Census,
Current Industrial Reports, MA22.

PRODUCTION OF TEXTILES

Finished Broad Woven Fabrics

Production & Exports of Finished Broad Woven Fabrics, 1982, 1983
(Millions of linear yards)

	Domestic Production	Exports	% Exports To Total Production
1983			
Total broad woven fabrics	7,676.6	337.3	4.4%
Cotton fabrics	2,750.3	97.6	3.5
Man made fiber fabrics	4,926.3	239.7*	4.9
1982			
Total broad woven fabrics	7,118.3	306.6	4.3
Cotton fabrics	2,519.5	100.5	4.0
Man made fiber fabrics	4,598.8	206.1*	4.5

* Includes some gray fabric not separately reported in some export categories.

Source: U.S. Bureau of the Census,
Current Industrial Reports, MA22S.

According to a study by the American Textile Manufacturers' Institute, covering world textile printing methods, in North America inthe period from 1968 to 1983, the share of the market for printed fabrics accounted for by roller printing declined from 85% to 30%. Rotary printing's share in the same period grew from 10% to 50%.

America's Textiles (March 1985) estimated that at present flat-bed printing has about a 4% share of the market, with transfer printing slowly edging up to 10%. Rotary screen printing is expected to take an increasing share of total printed fabric volume, due in part to the trend to wider greige cloth, adaptation which is difficult for roller print operations, as well as the trend in short runs, requiring frequent combination and pattern changes.

Technological improvements are rapidly being developed to counter the problems encountered by finishers in running shorter lots and to generally increase productivity and efficiency in finishing plants. As a step in the battle to remain competitive with imports, mills are beginning to turn to finishing equipment controlled by microprocessors.

In the apparel fabric market, demand for prints goes in cycles. Industry spokesmen reported at the onset of year 1985 that a print cycle has started which should last at least two years. The extent to which U.S. mills and converters will benefit, however, will depend on the success of efforts to control imports. Fancy fabrics produced by American companies are faring better than basics because of the speed with which demand can be met for fast-changing fashions. Imports generally require 6 to 9 months lead time, which gives the U.S. mills the advantage in fancies, but they have been forced to sharply cut prices to meet competition in basics, or to withdraw from the market entirely.

PRODUCTION OF TEXTILES

Finished Broad Woven Fabrics

Not only are the mills faced with direct competition from imported fabrics, but they are faced with a shrinking base of customers in the U.S., as apparel manufacturers are displaced by apparel importers, and are losing customers abroad because of the strong dollar, which has priced American fabrics out of some markets overseas, and because of import barriers raised by some foreign countries.

Production of major types of finished cotton and man-made broad woven fabrics by domestic producers in 1982 and 1983 has been reported as shown below.

Production of Specified Types of Broad Woven Fabrics, 1982, 1983
(Millions of linear yards)

	1983	1982
Cotton (or chiefly cotton) finished fabrics	7,676.6	7,118.3
Duck	72.5	66.6
Sateens, twills, drills, jeans, twill weaves	280.0	254.8
Plain print cloth, carded broadcloth	486.7	426.7
Tobacco, cheese, bandage cloth	585.4	578.1
Toweling & dishcloth fabrics	584.9	483.9
Corduroys	165.2	157.7
Flannels, blanketing, napped fabrics	92.8	86.5
All other (incl. bedsheeting, drapery & upholstery fabrics, poplins, etc.)	482.7	465.2
Man-made fiber (chiefly man-made) finished fabrics	4,926.3	4,598.8
Rayon and/or acetate	389.9	331.2
Nylon and chiefly nylon	320.1	330.9
100% polyester fabrics		
Spun yarn fabrics	156.1	150.3
Filament yarn fabrics		
Nontextured yarn fabrics	119.3	99.4
Textured yarn fabrics		
Lightweight	118.1	92.4
Heavyweight	179.6	142.5
Polyester/cotton blends (chiefly polyester)	2,849.6	2,751.7
Polyester/rayon blends (chiefly polyester)	381.5	367.1
Filament polyester/spun yarn combinations (chiefly polyester, incl. textured yarn)	281.7	203.7
Other (acrylic, saran, olefin, glass, etc.)	130.4	129.5

Source: U.S. Bureau of the Census, *Current Industrial Reports*, MA22S.

Narrow Fabrics (See section on VALUE OF PRODUCT SHIPMENTS)

PRODUCTION OF TEXTILES

Knit Fabrics

Output of domestic knit fabric mills was revived somewhat in 1983 and has continued through the first three-quarters of 1984, stimulated by a pro-knit cycle and a revitalized economy. A glut of imports and the growing extent to which U.S. retailers sourced overseas--resulting in huge inventories at the retail level--were cited by knitters as the main cause of the late 1984 downturn in knit goods business, which has continued in the first quarter of 1985.

The shrinking apparel market and the need to find new markets for warp and circular knits is the major problem facing the industry. Though retail demand is expected to pick up later in 1985 for basic commodity knits and fashion fabrics as retail inventories are worked down, and, also, as large retailers reevaluate their off-shore sourcing programs, which require long lead times and large orders.

The knit fabrics industry is actively searching for new constructions and new processes to fit new nonapparel applications for all types of warp and circular knits, including home furnishings, industrial, automotive, military and medical products.

Within the apparel segment of the market, certain facets have fared better than others--including activewear fabrics. Tricot lingerie fabrics have been severely hurt in recent years by the switch in fashions toward wovens; however, there were indications early in 1985 that tricots were coming back in sleepwear and daywear.

The latest-available Census Bureau data shows production of knit fabrics in the U.S. in 1985 was over 1.5 billion pounds, 15.4% above the 1982 total and 7.0% above 1981. All the gain compared with 1981 was in the weft knit segment. Production indexes compiled by the Federal Reserve Board covering the U.S. knit goods industry (which includes products made in knitting mills other than fabrics) for the year 1984 averaged 186.1 (1967=100). This was slightly (-0.6%) below the 1983 index but 8.0% above the index for 1982.

Summary of Knit Fabric Production
(Millions of pounds)

	1983	1982	1981(r)	1980
Knit fabric production	1,510	1,309	1,411	1,597
Warp knit fabric	330	289	359	407
Tricot, simplex & milanese	272	239	294	343
Raschel & raschel-crochet	58	50	65	64
Weft knit fabric	1,180	1,019	1,052	1,190
Single circular knit, incl. high pile and terry	838	703	666	688
Double knit & interlock	244	229	284	381
Rib knit	99	88	103	121

PRODUCTION OF TEXTILES

Knit Fabrics

Production of Specified Knit Fabrics by End-Use, 1980, 1983
(Millions of pounds)

	1983	1980
Warp knit yardgoods	330.0	407.0
Tricot, simplex & milanese	272.4	343.2
Underwear, nightwear, loungewear, lingerie foundations	144.6	192.9
Outerwear fabric	54.6	73.6
All other tricot fabrics	68.8	61.2
End-use not specified	4.3	15.6
Weft knit yardgoods	1,180.4	1,189.9
Single circular knit, excluding high pile, terry cloth, etc.	531.1	463.6
Underwear & nightwear	214.2	196.4
Shirts, tops, blouses, dresses	258.0	178.5
All other uses	47.8	72.3
Double knit & interlock	243.5	380.8
Outerwear apparel other than shirts	129.3	254.0
Shirts, blouses & tops	87.0	90.3
All other uses	17.4	19.7
End-use not specified	9.8	16.8

Distribution of Specified Knit Fabrics Off Knitting Machines, 1983

	Warp Knit Fabric (Based on pounds)	Weft Knit Fabric (Based on pounds)	Knit Garment Lengths Trimings, Collars (Based on quantity in dozens)
Total	100.0%	100.0%	100.0%
Produced for sale	14.2	50.0	52.0
Produced for own use	77.2	41.5	21.1
Produced on commission	8.6	8.5	26.9

Source: U.S. Bureau of the Census,
Current Industrial Reports, MA22K (Sept. 1984).

Nonwoven Fabrics

The market for nonwoven fabrics continues to expand at a good pace. Not all uses are developing at the same rate, but new markets are opening up which favor the overall outlook for this industry. The value of nonwoven fabrics consumed in the U.S. in 1984 reached an estimated $1.56 billion, according to John R. Starr, industry consultant, with nonwovens for disposable applications accounting for $870 million and durable end uses, $690 million. A growth rate of 11% per year through 1990 was forecast, with the market for disposable nonwovens reaching a value of $1.61 billion and durables rising to $1.31 billion.

PRODUCTION OF TEXTILES

Nonwoven Fabrics

U.S. firms were reported to be producing about one billion pounds of nonwoven roll goods in 1984, and it is estimated that the annual total by the end of the decade will reach 1.7 billion pounds. The fiber component, alone, is estimated at 800 million pounds, of which polyester represents 25%. Celanese is investing heavily in efforts to expand its market share in nonwovens.

Although a slowing-down in the rate of growth is underway, the disposable diaper market continues to be a major one for nonwovens, valued at $215 million in 1984 and expected to reach a value of $360 million by 1990. Penetration of nonwovens in the disposable baby diaper market was only 44% ten years ago, but is close to 80% at the present time and expected to reach 90%.

Hospital-related uses are also a growing market for disposable nonwovens. This market is expected to expand from its present size estimated at $160 million to $285 million by 1990, according to Starr. Roll goods for wipes, a $145 million market at present is expected to reach $285 million by 1990.

In durable applications, the interlining market as a whole has been cut-back as a result of production of apparel overseas and imports, but nonwovens are taking a bigger share of the available domestic market, with the current value of this market estimated at $115 million in 1984, compared with a value of $65 million ten years ago. Construction uses, including geotextiles and roofing, are the fastest-growing markets for durable nonwovens. Valued at $100 million in 1984, this market is expected to expand at a rate of 17% a year to hit $245 million by 1990.

Growth in the nonwoven textile industry will be fostered by advances in the technology of producing nonwovens as well as by the development by fiber producers of new fibers with special light-weight and other characteristics needed for this specific end use.

VALUE OF PRODUCT SHIPMENTS

Preliminary estimates on the value of shipments of specified products of the textile/apparel complex for the year 1984 (subject to revision), as well as on the relationship of exports and imports in the overall supply picture, have been reported by the International Trade Administration, U.S. Department of Commerce.

Estimated Value of Shipments, Imports & Exports, 1984
(Millions of dollars)

	Cellulosic Fibers	Non-Cellulosic Fibers	Yarns (incl. wool)	Broad Woven Fabrics	Knit Fabrics	Apparel & Other Tex. Products
Product shipments*	$1,346.0	$8,244.0	$5,599.0	$17,859.0	$4,763.0	$57,287.0
Exports	53.1	941.1	67.1	580.2	57.7	989.0
Imports	28.5	300.5	250.8	2,120.0	28.2	14,319.0
Exports as a % of shipments	3.9	11.4	4.5	3.2	1.2	1.7
Imports as a % of apparent consumption (value)*	2.2	3.9	4.3	10.9	0.6	20.3

(footnotes continued)

VALUE OF PRODUCT SHIPMENTS

* In contrast with "industry shipments", product shipments include the value of shipments of specified products by all producers, regardless of the producer's industry classification.

** Apparent consumption is the sum of product shipments plus imports less exports.

Source: U.S. Dept. of Commerce,
International Trade Admin.,
1985 U.S. Industrial Outlook.

Based on a constant (1972) dollar value, the compound annual rate of growth of specified shipments in "real" value vs. current dollar value has been reported as follows for 1972-1983:

Compound Annual Rate of Growth (Loss), 1977-1982

	Current $	Constant $
Cellulosic fibers	+ 5.5%	- 2.4%
Non-cellulosic fibers	+ 4.9	- 3.5
Textile mill products	+ 3.3	- 2.0
Yarns, except wool	+ 1.5	- 3.5
Yarns, wool	+ 1.2	- 4.0
Cotton broadwoven fabrics	- 3.3	- 7.5
Man-made fiber fabrics	+ 5.5	- 1.0
Wool fabrics	+ 7.1	+ 1.4
Knit fabrics	- 3.0	- 6.7
Apparel & other textile products	+ 5.8	+ 0.2

Source: U.S. Dept. of Commerce,
International Trade Commission,
1985 U.S. Industrial Outlook.

Estimated Value of Specified Products, 1983, 1984
(Millions of current dollars)

			% Change 1984/1982	
	1984	1983	Current $	Constant $
Cellulosic fibers	$ 1,346	$ 1,190	+ 20.7%	+ 15.5%
Non-cellulosic fibers	8,244	7,670	- 4.5	- 7.8
Textile mill products*	53,972	50,535	+ 20.0	+ 12.7
Yarn mills, incl. wool	5,599	5,340	+ 18.3	+ 15.4
Broadwoven fabrics	17,859	16,042	+ 30.0	+ 22.1
Cotton fabrics	3,980	3,753	+ 17.0	+ 11.3
Man-made fiber fabrics	12,737	11,339	+ 33.8	+ 25.0
Wool weaving/finishings	1,142	950	+ 39.4	+ 33.5
Knit fabrics	4,763	4,338	+ 30.5	+ 20.6
Apparel & other textile products**	57,287	55,435	+ 7.3	+ 3.4

* Includes knitting mill products (knit underwear, knit outerwear, hosiery, etc.) which are not separately reported.
** Value covers "industry shipments".

VALUE OF PRODUCT SHIPMENTS

Projected Value of Fiber Shipments, 1985
Compared With 1982 & Peak Year
(Dollar values in millions, constant (1972) dollars)

	1985	1982	Peak Year	% Change 1985/Peak
Cellulosic fibers	$ 730	$ 554	1979	- 9.6%
Non-cellulosic fibers	5,943	4,535	1979	- 12.4

Source: U.S. Dept. of Commerce,
International Trade Administration,
1985 U.S. Industrial Outlook.

According to the American Textile Manufacturers Institute, textile shipments in 1984 amounted to $55,237 million, 5.9% above the 1983 total reported by this source at $52,175 million. Shipments in Feb. 1985 were at a seasonally adjusted total 11.9% below the Feb. 1984 level.

Every five years, the Census Bureau of the U.S. Department of Commerce, conducts a complete census of manufactures (as well as other types of business), which develops the most detailed information available on production, shipments and other operating data.

Findings in the 1982 census of manufactures are currently being released, and the following shows comparisons available in textile/apparel classifications compared with product shipments in 1977, on a current dollar basis (which does not adjust for inflation).

Value of Shipments of Specified Products, 1977, 1982
(Including interplant-transfers)
(Millions of dollars)

	1982	1977	% Change 1982/1977
Fibers			
Cellulosic	$1,114.8	851.1	+ 31.0%
Non-cellulosic	8,637.3	6,692.3	+ 29.1
Nylon, except producer-textured	1,891.1	1,962.9	- 3.7
Acrylic & modacrylic, except textured	595.5	495.8	+ 20.1
Polyester, except producer-textured	2,679.1	1,938.6	+ 38.2
Other non-cellulosic fibers, except producer-textured	445.9	178.2	+150.2
Producer-textured non cellulosics	1,519.7	890.6	+ 70.6
Non-cellulosic fibers, type not specified	18.6	5.4	+244.4

(continued)

VALUE OF PRODUCT SHIPMENTS

Value of Shipments of Specified Products, 1977, 1982
(Including interplant-transfers)
(Millions of dollars)

	1982	1977	% Change 1982/1977
Yarns, except wool	5,261.5	4,825.8	+ 9.0
Yarns, wool	248.2	234.4	+ 5.9
Thread	614.6	551.1	+ 11.5
Throwing & winding	3,653.0	2,449.1	+ 49.2
Weaving mill products (grey goods)			
Cotton broad woven fabrics	3,635.0	4,132.0	- 12.0
Man-made fiber/silk fabrics	7,820.3	5,981.5	+ 30.7
Wool broad woven fabrics	834.0	581.3	+ 43.5
Narrow fabrics (woven, braided)	826.1	645.0	+ 28.1
Finishing mill products*			
Finished cotton broad woven fabrics	1,492.9	1,513.7	- 1.4
Finished man-made fiber/silk fabrics	3,877.2	3,264.7	+ 18.8
Finished yarn, raw stock & narrow fabrics	1,484.5	1,616.6	- 8.2
Knitting mill products	13,275.6	10,803.8	+ 22.9
Apparel (not including knitting mill products)**	43,059.0	32,031.9	+ 34.4
Other fabricated textile products (home textiles, pleating, stitching, canvas & related products, etc.)	11,340.8	9,097.4	+ 24.6

* A limited part of the value reported includes fabric finished in weaving mills.

** The value of product shipments is not currently reported for apparel. The above figures cover the value of industry shipments. (For explanation of terms, see page 4.)

Source: U.S. Bureau of the Census, 1982 Census of Manufactures Industry Series MC82-1-22A, -22B, - 29B & preliminary report MC82-SUM-1(P).

Narrow Fabrics

According to an industry analysis by America's Textiles (May 1985), the narrow fabric trade (including all types: woven, knitted or braided, and engineered textiles for metal and plastic reinforcements) grew in value from $2.843 billion in 1977 to $3.029 billion in 1982.

According to this source, a forecast done by Predicast, Inc., predicts substantial growth in narrow fabric production (4.4% through 1987). narrow fabric production for defense (7.1% through 1987), and non-paper gift wraps (8.6% through 1990). Narrow fabrics enjoy a favorable trade balance because of U.S. flexibility in custom dyeing and fast delivery.

VALUE OF PRODUCT SHIPMENTS

Narrow Fabrics

Based on a survey by mail along all known producers of woven narrow fabrics (12 inches or narrower in width), not including ribbons cut from broadwoven material, the Census Bureau has compiled the following statistics on quantity and value of shipments in 1983 and in 1982.

Quality & Value of Specified Types of Narrow Fabrics, 1982, 1983
(Including interplant transfers)
(Millions of linear yards & millions of dollars)

	1983		1982	
	Quantity	Value	Quantity	Value
Narrow fabrics, woven & braided	X	$ 796.9	X	$ 723.3
Woven	X	640.9	X	572.8
Elastic narrow fabrics	1,545.2	196.4	1,323.4	172.8
Nonelastic	X	444.4	X	400.0
Ribbons, woven edge	954.7	80.8	997.5	79.9
Woven labels (mil. labels)	5,422.3	77.6	4,707.6	68.4
Tapes	2,393.2	88.4	2,251.3	83.4
Webbing	888.2	116.8	697.3	102.9
All other woven, nonelastic narrow fabrics	X	80.7	X	65.4
Braided	X	148.7	X	143.9
Type not specified	X	7.3	X	6.6
Knitted narrow fabrics	254.9	38.8	249.1	36.5

X Not applicable because of differences in units of measure of component products.

Note: The above represents quantity and value of products made from own materials and excludes production made from materials owned by others.

Source: U.S. Bureau of the Census,
Current Industrial Reports
(MA22G(83)-1.

The value of shipments of woven narrow fabrics reported in the complete 1982 census of manufactures was $807.7 million. Included in this total (but not in the CIR) are shipments of covered rubber thread, valued at $60.3 million in 1982.

Information on the quantity of production and the value of shipments of specific types of apparel is compiled on a current basis by the U.S. Census Bureau based on a survey of manufacturers, not including very small firms (usually less than five employees), and issued in reports in the *Current Industrial Reports* series.

The value of shipments reported for classifications of apparel covered in this source in 1983 and 1982 was as follows.

VALUE OF PRODUCT SHIPMENTS

Value of Shipments of Major Categories of Apparel, 1982, 1983
(Millions of dollars)

	1983	1982	% Change 1983/1982
Total reported classifications of apparel*	$34,557.2	$30,093.4	+ 14.8%
Men's & boys' wear, total	14,278.6	13,808.5	+ 3.4
Men's wear, total	12,397.0	11,995.9	+ 3.3
Suits, coats, rainwear, dress & sport coats, vest	2,344.1	2,304.4	+ 1.7
Shirts (woven, knit), sweaters	2,716.0	2,761.3	- 1.6
Trousers, jeans, slacks, shorts	3,661.0	3,347.9	+ 9.3
Outerwear jackets, exc. leather	621.3	699.8	- 11.2
Activewear (men's & boys')	987.0	892.6	+ 10.6
Work wear	951.1	960.3	- 1.0
Underwear, nightwear	1,116.5	1,029.6	+ 8.4
Boys' wear, total	1,881.6	1,812.6	+ 3.8
Outer apparel**	999.2	1,593.3	- 37.3
Underwear, nightwear	182.4	219.3	- 16.8
Women's & children's wear, total	20,278.6	19,301.8	+ 5.1
Women's, misses', junior wear, total	17,250.8	16,284.9	+ 5.9
Dresses	3,375.9	3,186.2	+ 5.9
Suits, coats, raincoats	1,254.4	1,218.2	+ 3.0
Jackets	1,016.7	998.4	+ 1.8
Separates (blouses, shirts, skirts, pants, tops, bottoms, sweaters)	8,324.2	7,854.8	+ 6.0
Activewear	685.1	630.4	+ 8.7
Playwear	220.6	193.4	+ 14.1
Washable service apparel	269.2	254.0	+ 6.0
Daywear, nightwear, foundations	2,104.7	1,949.5	+ 8.0
Girls', children's, toddlers', infants' wear	3,027.8	3,016.9	+ 0.4

* Covered categories do not include hosiery, accessories, leather apparel, millinery or furs.

** Boys' activewear is included in with men's activewear.

Source: U.S. Bureau of the Census, Current Industrial Reports.

PRODUCER PRICE LEVELS

Producer (Factory) Price Index, 1983, 1984 & March 1984, 1985
(1967 = 100, unless otherwise noted)

	March Average (Unadjusted)			Annual Average		
	1985	1984	% Change 1985/1984	1984	1983	% Change 1982/1983
Industrial commodities	322.6	321.9	+ 0.2%	322.6	315.7	+ 2.2%
Textile products & apparel	210.4	209.9	+ 0.2	209.9	205.1	+ 2.3
Selected tex. mill products*	142.6	141.5	+ 0.8	142.1	138.2	+ 2.8
Synthetic fibers*	156.6	161.2	- 2.9	159.6	156.7	+ 1.8
Processed yarns & threads*	141.4	143.8	- 1.7	142.7	138.5	+ 3.0
Gray fabrics*	152.5	152.9	- 0.3	153.7	147.0	+ 4.6
Finished fabrics*	127.1	127.1	-0-	126.6	123.1	+ 2.8
Apparel products	203.2	200.7	+ 1.2	201.1	197.4	+ 1.9
Women's wear	180.9	179.8	+ 0.6	179.1	176.8	+ 1.3
Men's wear	229.8	225.8	+ 1.8	227.2	222.4	+ 2.2
Infants' & children's wear	203.7	135.4	+50.4	136.6	134.0	+ 1.9
Textile housefurnishings	240.6	237.1	+ 1.5	239.2	235.1	+ 1.7
Final textile products, n.e.c.*	135.1	135.1	-0-	135.3	134.8	+ 0.4
Carpets & rugs	167.1	164.0	+ 1.9	166.7	162.5	+ 2.6

* Dec. 1975 = 100
n.e.c. not elsewhere classified.

Source: U.S. Bureau of Labor Statistics.

FOREIGN TRADE

In 1984, according to the American Textile Manufacturers Institute, U.S. imports of textiles and apparel totaled 10.2 billion square yard equivalents, a 37% increase over 1983's record level. In dollar value, imports were up 44.7%, while exports gained only 1%. This resulted in the $16.2 billion textile and apparel trade deficit for 1984, which was 53% higher than 1983's record level of $10.6 billion. The 1984 deficit represented 13% of the total U.S. merchandise trade deficit last year. ($123 billion).

FOREIGN TRADE

U.S. Trade Balance in Textiles/Apparel, 1983, 1984
(Millions of dollars)

	Imports (c.i.f.*)			Exports (f.a.s.)**			Balance		% Change
	1984	1983	% Chg.	1984	1983	% Chg.	1984	1983	1984/83
Total	$19,386.9	$13,752.4	+41	$3,189.1	$3,185.2	+0.1	-$16,197.8	-$10,567.2	+ 53
Textiles	4,874.1	3,460.2	+41	2,381.8	2,367.7	+0.6	- 2,492.3	- 1,092.5	+128
Apparel	14,512.8	10,292.2	+41	807.3	817.5	-1.2	- 13,705.5	- 9,474.7	+ 45

* c.i.f.: This value includes the price actually paid for the merchandise plus all shipping charges, insurance, etc., incurred in bringing the shipment to the first port of arrival in the U.S. U.S. import duties are not included in the c.i.f. value.

**f.a.s.: (free alongside ship) value at the U.S. port of export, including the transaction price, inland freight, insurance and other charges in bringing the shipment to the carrier at port of exportation.

Source: ATMI based on U.S. Department of Commerce reports.

In terms of square yard equivalents (SYE), man-made fiber textile/apparel imports amounted to 57.5% of textile/apparel imports in 1984 (58.7% in 1983); cotton, 39.9% (vs. 38.9%); wool, etc., 2.7% (2.3%).

U.S. Imports of Textiles/Apparel, 1983, 1984
(Million SYE)

	1984(p)	1983	% Change 1984/1983
Total	10,169.8	7,705.9	+ 32.0%
Man-made fiber, total	5,847.7	4,524.1	+ 29.3
Yarns	1,029.1	686.2	+ 50.0
Fabrics	967.7	770.4	+ 25.6
Apparel	2,838.1	2,363.7	+ 20.1
Made-up & miscellaneous	1,012.7	703.7	+ 43.9
Cotton, total	4,062.1	3,000.9	+ 35.4
Yarns	218.0	165.5	+ 31.8
Fabrics	1,528.9	1,067.2	+ 43.3
Apparel	1,733.8	1,392.1	+ 24.5
Made-up & miscellaneous	581.3	376.1	+ 54.5
Wool, total	260.0	180.9	+ 43.7
Yarns	32.3	16.1	+100.6
Fabrics	49.5	33.0	+ 50.0
Apparel	158.9	118.5	+ 34.1
Made-up & miscellaneous	19.3	13.3	+ 45.1

(p) preliminary

Source: ATMI based on U.S. Department of Commerce,
Office of Textiles & Apparel reports.

FOREIGN TRADE

Import totals surged in the 1st half of 1984. There was a tremendous build-up of inventory of imported goods in the U.S. as consumer demand fell at the same time. These conditions have continued in the first half of 1985. The total value of imports of textiles and apparel in the first four months this year reached more than $6.5 billion, up 7.1% compared with the same 1984 period.

Due to the strong U.S. dollar, which has made American products expensive for foreign customers, to the growth in competition from foreign suppliers, and poor economic conditions in some areas, U.S. exports have suffered. The decline in textile/apparel product exports, in general, continues while the strong dollar works to the advantage of foreign suppliers. The combined value of exports of textiles and apparel by the U.S. in January-April 1985 fell 3.8% compared with the same 1984 period, reaching $1.115 billion in value, according to the American Textile Manufacturers Institute.

The following estimates on imports and exports in 1984 were compiled by the International Trade Administration.

Value of Imports & Exports of Textiles & Apparel, 1982, 1984
(Millions of dollars)

	Imports			Exports		
	1984(e)	1982	% Change	1984(e)	1982	% Change
Man-made fibers						
Cellulosic	$ 28.5	$ 21.4	+ 33.2%	$ 53.1	$ 70.4	- 24.6%
Non-cellulosic	300.5	91.7	+227.7	941.1	1,083.0	- 13.1
Textile mill products	3,764.0	2,225.0	+ 69.2	1,565.0	1,766.0	- 11.4
Yarns	250.8	121.9	+105.7	67.1	90.3	- 25.7
Broad woven fabrics	2,120.0	1,244.0	+ 70.4	580.2	734.4	- 21.0
Cotton	979.2	474.9	+106.2	174.0	241.3	- 27.9
Man-made fiber	953.2	654.9	+ 45.5	399.9	487.3	- 17.9
Wool	187.5	114.5	+ 63.8	6.3	5.8	+ 8.6
Knit fabrics	28.2	17.6	+ 60.2	57.7	55.6	+ 3.8
Apparel & other textile products	14,319.0	8,432.0	+ 69.8	989.0	1,236.0	- 20.0

(e) estimated

Source: U.S. Dept. of Commerce, International Trade Administration
1985 U.S. Industrial Outlook.

According to a study by the International Trade Commission (ITC), reported in May 1985, textile and apparel imports fluctuated with no definite trend in the period 1974 through 1980. But between 1980 and 1984, U.S. imports of foreign textiles, and apparel doubled, from 4.9 billion SYE in 1980 to 9.8 billion SYE last year, and it appears that another increase will be registered this year.

An analysis of apparel sourcing in the U.S. made by Kurt Salmon Associates (March 1985) showed an estimated 26% of U.S. apparel (dollar value) is sourced overseas. Slightly less than half of this is sourced directly by retailers--about 13.%. Year-to-year growth in imports of apparel averaged 12.5% from 1972 to 1984. Through 1983, the growth rate was lower--10.4%, but the big surge in 1984 pushed up the average rate.

FOREIGN TRADE

The impact of imports varies by product type and industry claims vary. According to figures compiled by DuPont, imports in 1984 accounted for 43% of fiber poundage represented by the textile/apparel market in the U.S., 10% of home-furnishings, 8% of carpeting. Within the apparel market, the most heavily affected by imports include sweaters, gloves, body-support garments, women's coats and blouses, all of which had import penetration levels of 43% or more in 1983, according to the ITC. The International Ladies' Garment Workers' Union (ILGWU) claims that one out of every two garments sold in the U.S. --including men's, women's and children's--is an import.

Hourly earnings in the U.S. textile mill products industry averaged $6.46 in 1984 and in the apparel and other textile products industry, $5.53. This compares with an average textile wage of 30 cents an hour in China, 50 cents in the Philippines, $1.75 in Taiwan and $2.10 in Hong Kong. (Daily News Record, June 7, 1985).

At mid-year 1985, all levels of the textile/apparel complex in the U.S. is entering a crucial period in regard to imports--at the government level and in inter-company relationships within the manufacturing/distribution/retailing chain.

On a broad basis, U.S. global commitments and relationships with the European Economic Community (EEC) are involved. The Multi-Fiber Arrangement (M-FA), developed by the EEC, and adhered to by the U.S., expires in July 1986. Since 1974, this arrangement has controlled trade in textiles and apparel by providing the legal framework for a series of bilateral agreements among 50 participating countries in order to provide for the orderly development of international trade in textiles and apparel. Unrelated curbs involving quotas can be imposed where a threat of serious market disruption exists. The U.S. has recently decided to impose such controls on imports of textiles and apparel from Brazil, after a failure in negotiations to renew a bilateral agreement.

The M-FA will expire in July 1986, and meetings will begin in June 1985 to discuss its future. The U.S. government has taken a number of steps to curb imports by negotiating 34 bilateral agreements establishing import quotas under the M-FA provisions and tightening rules on country-of-origin. However, additional restrictions are needed if the domestic industry is to survive.

Problems to be faced include leaks in the quota system, including rules governing imports from Third World countries which are not included in the M-FA rules (these countries are pressuring for the abandonment of these controls), the "flexibility" provisions under M-FA rules, and holes in the coverage by fiber type.

The flexibility provisions have enabled larger textile/apparel exporting countries--including China, Korea, Hong Kong and Taiwan--to greatly increase their shipments to the U.S. in spite of quotas by shifting quotas from one category to another, by borrowing quotas from a future year or carrying forward quotas from a previous year, according to an ITC study. The ITC further notes that imports of non-MFA fibers, such as silk, linen and ramie, have soared in the absence of import restraints.

FOREIGN TRADE

So-called "controlled imports" to the U.S. are reported to be rising at a 25% to 30% annual rate, while uncontrolled imports are exploding at a 70% to 80% rate. The U.S.'s new country-of-origin regulations are viewed as resulting in more and more fabric being purchased and cut in quota-free countries.

The Textile and Apparel Trade Enforcement Act of 1985 was introduced in Congress in March 1985. This is designed to rollback quotas and has the enthusiastic support of fiber producers, mills, apparel manufacturers, and unions, but not the Administration, which takes the position that the bill violates the Multi-Fiber Arrangement and the agreements that the U.S. has negotiated under MFA rules. Retailers, too, are generally opposed to the provisions of the bill.

Meanwhile, the fiber and textile mill companies have launched a major public relations campaign, Crafted With Pride in the USA, to make the American consumer more aware of the plight of U.S. producers, and to convince consumers to buy American apparel.

A partial solution for the apparel industry in competing with imports--and for the textile industry, too, to the extent that American fabrics are used--lies in the use of duty provision Item 807. This allows U.S. firms to ship components to foreign operations that assemble the final product and ship it back to the U.S., where duty is levied only on the value added abroad, rather than on the total value. Some U.S. textile mills, as well as apparel manufacturers, are involved successfully in 807 operations, particularly in the Caribbean, and this is growing.

Efforts are being made to liberalize quotas covering apparel imports from the Caribbean basin, establishing a two-quota system under which American fabrics and yarns would be given an additional quota under Item 807. However, textile industry support is lessening as it is viewed as possibly a divisive agent in mustering the strong coalition of support needed for passage of the Textile and Apparel Enforcement Act of 1985.

Maintaining a unified stand on the import problem among the diversified group affected by textile/apparel imports is virtually impossible. While operations of apparel cutters conducted abroad under Item 807 benefit mills to the extent that American fabrics are used, some large companies have established their own operations abroad and are using foreign fabrics in these operations as well as in U.S. plants.

Compounding the problem has been the great growth in off-shore sourcing by retailers. While many were burned by over-ordering in 1984, and are also becoming aware of problems in financing deliveries, in re-orders and the need for advance orders when sourcing abroad, there is still a strong interest among retailers in imports to maintain competitive exclusivity and to provide private label merchandise. Retailers are also very concerned about maintaining their sources of supply on lower priced merchandise which is viewed as essential to compete in the discount/off price/special price promotion atmosphere that dominates today's retailing picture. U.S. apparel buyers currently sourcing in the Far East claim that if restrictive textile import legislation is enacted, consumer prices will rise at least 20 to 30%, while importers scramble to find new suppliers.

FOREIGN TRADE

An analysis of present and projected sources of supply the U.S. apparel market has been compiled by Kurt Salmon Associates, and is summarized below.

Present & Projected Sources of Supply To The U.S. Apparel Market

	1983	1984	Projected 1995
Apparel retail sales, total (billions)	$ 97	$ 105	$ 128
Share accounted for by			
Domestic supplies	75.0%	72.3%	50.0%
Item 807	1.4	1.5	5.0
Imports	23.6	26.2	45.0
Cost of goods sold or landed duty-paid (billions of constant 1984 $)			
Apparel, total	$ 45.0	$ 48.6	$ 59.2
Domestic	33.8	35.1	29.6
807	0.6	0.7	3.0
Imports	10.6	12.8	26.6
Direct by retailers	5.0	6.5	9.4

Source: Kurt Salmon Associates, 3rd Annual Sourcing Report, (March 1985).

In late May 1985 several big U.S. retailers announced plans for a major advertising campaign to counteract the textile industry's major promotion, Crafted With Pride in U.S.A., which is designed to get consumers to buy American-made apparel and other textile products. The retailers' effort, sponsored by the Retail Industry Trade Action Coalition (RITAC), has been launched in opposition to pending governmental action, and calls for a system of totally free trade, with the argument that current trade restrictions cost the American consumer billions of dollars annually in "hidden costs", quoted at $23 billion in 1984. (including $4 billion due to quotas and $19 billion in tariffs).

CAPITAL EXPENDITURES, TEXTILE & APPAREL MACHINERY & EQUIPMENT

Expenditures for New Plant & Equipment

In addition to the activities described above, the textile industry has been making major efforts to compete with imported fabrics and apparel through plant modernization as well as adopting new methods of automation which speeds up the handling of orders and reorders, and produces short runs to customer specifications. Such efforts have been much more pronounced among the textile mills than in the apparel industry. The latter is faulted by the textile segment for manufacturing investments in the Far East, and for concentrating marketing efforts in the U.S. and building brand names rather than domestic production, particularly in the last few years.

Figures on total capital expenditures (new) are reported in the GENERAL INDUSTRY STATISTICS section of this Fact File, based on the 1982 census of manufactures. Compared with the year 1977, spending by the Textile Mill Products Industry rose 28.3% (Current $ basis) spending by the Apparel Industry rose 49.4%; by the non-cellulosic man-made fibers industry up 30.9%.

Textile Mill

Modernization efforts in the textile industry have focused on equipment and techniques which increase productivity, including computer-aided automated equipment, shuttleless looms, and open-end spinning. Ahead may be greater reliance on robots, as well as on computers and automation in both textile and apparel jobs.

Ringless spindles, used in yarn spinning operations, have an efficiency rate two or three times that of conventional spindles. Although ringless spindles only represent a small proportion of the total spindles in operation, over one-fourth of replacement spindles are ringless.

Shuttleless looms have greatly increased the speed and efficiency of woven fabric production, while requiring less floor space than conventional looms.

Expenditures for new plant and equipment by the textile industry reached a record total of $1.92 billion in 1984, about 24% over the 1983 total. On a constant dollar basis, 1984 expenditures were up 22% compared with 1983--the highest gain in "real" terms since 1974. Based on planned capital expenditures reported by business in April and May 1985, the textile industry is expected to spend $2.08 billion (current dollars) in 1985 on new plant and equipment, representing a gain of 8.3%, according to the Bureau of Economic Analysis, U.S. Department of Commerce. This is in contradiction to trade reports indicating plants to cut back on spending due to the pressure of rising imports and to the decline in exports.

CAPITAL EXPENDITURES, TEXTILE & APPAREL MACHINERY & EQUIPMENT

Textile Mills

New Plant & Equipment Expenditures by Textile Mills, 1974-1984
(Billion of dollars)

Year	Current $	Constant (1972) $
1974	$ 1.06	$ .91
1975	.86	.64
1976	.98	.69
1977	1.18	.79
1978	1.31	.81
1979	1.42	.80
1980	1.54	.80
1981	1.66	.81
1982	1.46	.69
1983	1.55	.72
1984	1.92	.88

Source: U.S. Department of Commerce,
Bureau of Economic Analysis
Survey of Current Business (Feb. 1985).

As noted above, data on total capital expenditures by broad industry groups based on census of manufactures' reports issued by the Census Bureau are covered in the GENERAL INDUSTRY STATISTICS section. The detailed Industry Series reports issued by the Census Bureau should be referred to for details on spending for machinery on a 4-digit SIC code basis. This information has been compiled through a special survey by mail of all large manufacturing establishments and a proportionate sample of medium and small establishments.

Spending For Machinery & Equipment By Specified Mills, 1982
(Millions of dollars)

	Weaving Mills Cotton	Weaving Mills Man-made Fiber	Knit Fabric Mills Circular Knit	Knit Fabric Mills Warp Knit
Gross book value of depreciable assets-- Machinery & equipment				
Beginning of year	$ 1,694.2	$ 3,530.6	$ 742.3	$ 436.9
New expenditures	234.5	331.2	54.7	35.5
Autos, trucks, etc., for highway use	0.4	1.1	1.4	0.4
Computers & peripheral data processing equipment	4.0	4.2	1.3	0.8
All other machinery/equipment	230.1	325.9	52.0	34.4
Used capital expenditures	10.9	20.2	8.4	14.6
Retirements	104.2	204.1	97.4	34.0
End of year	1,835.4	3,677.8	708.0	452.8

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982, Industry Series
(Above based on a sample survey).

CAPITAL EXPENDITURES, TEXTILE & APPAREL MACHINERY & EQUIPMENT

Apparel & Other Mills Products

Technological innovations in the apparel industry have been undertaken primarily by the larger firms, which is to be expected in view of the composition and labor-intensive character of this industry. The new techniques require considerable capital investment and are best suited to large-scale operations, where they have the biggest impact on labor costs.

Recent developments in the apparel industry include the use of lasers to cut fabrics, computer-aided pattern design, and programmable automatic sewing machines. The application of these techniques is limited, however, because of the frequent changes in fashion which requires frequent adjustments of equipment.

Current fashion trends toward "upscale", more detailed, higher quality apparel have meant more labor time per garment. The industry is examining new techniques using robotics and an integrated "cell" approach to reduce labor costs and improve output consistency, The extent to which these new developments prove successful and are adopted will determine the outcome on the survival of the domestic apparel industry.

The TC Square project of the Draper Laboratories is developing an automated sewing system capable of positioning fabrics at the sewing head and automatically pinning them, without the aid of an operator.

The following table indicates the type of information available in the Industry Series of the 1982 census of manufactures' reports (this based on a sample survey as opposed to a complete census), on machinery and equipment in components of the apparel industry.

Spending For Machinery & Equipment By Specified Cutters, 1982
(Millions of dollars)

	Women's & Misses' Dresses	Women's & Misses' Coats & Suits	Men's & Boys Shirts/Nightwear
Gross book value of depreciable assets--	$ 358.9	$ 404.0	$ 365.9
Machinery & equipment			
Beginning of year	253.8	226.0	224.6
New expenditures	25.8	21.6	30.2
Autos, trucks, etc., for highway use	1.1	2.7	0.7
Computers & peripheral data processing equipment	3.6	0.4	1.8
All other machinery/equipment	21.3	18.6	27.8
Used capital expenditures	0.7	1.4	1.7
End of year	28.7	25.8	20.7

Source: U.S. Bureau of the Census,
Census of Manufactures 1982, Industry Series
(Above based on a sample survey).

CAPITAL EXPENDITURES, TEXTILE & APPAREL MACHINERY & EQUIPMENT

Textile Machinery in U.S. Mills

Cotton System Spindles, 1981-1983

(Annual Averages)

	1984	1983	1982	1981
Spindles in place (thousands)	14,521	15,640	16,086	16,744
Spindles active (thousands)	13,548	14,242	14,179	15,435
Hours operated per active spindle*	6,242	6,278	5,487	5,885

* Based on spindle hours operated by spindles active at the end of the period.

Source: American Textile Manufacturers Institute, Inc.

Knitting Machines Producing Knit Fabrics, 1980-1983

(Machines operating on last day of the year)

	1983	1982	1981	1980
Knit fabric machinery, total	25,955	26,677	30,700	34,485
Warp knit fabrics, total	5,459	5,137	6,243	7,159
Tricot, simplex & milanese	3,527	3,345	4,032	4,579
Raschel, raschel-crochet	1,932	1,792	2,211	2,580
Weft knit fabrics, total	20,496	21,540	24,457	27,326
Single circular knit fabrics	12,770	13,058	13,775	13,776
Double knit & interlock	4,408	4,833	5,832	8,368
Rib, other than double knit & interlock	3,318	3,649	4,850	5,182

Source: U.S. Bureau of the Census,
Current Industrial Reports (MA22K).

Broad Woven Fabric Machinery in Place At End of Year, 1981-1984

	1984	1983	1982(r)	1981
Looms, total	181,511	193,872	214,693	250,966
Single shuttle cam looms	81,532	92,848	121,555	140,636
Single shuttle dobby looms	27,307	30,333	29,980	44,242
Multiple shuttlebox or head motion looms	9,911	10,890	10,799	13,419
Double shuttle pile & plush jacquard looms	5,346	6,199	6,096	7,847
Shuttleless looms & weaving machines	57,415	53,602	46,263	44,822
Single filling insertion	40,223	37,664	33,368	34,261
Multiple filling insertion	17,192	15,938	12,895	10,561

CAPITAL EXPENDITURES, TEXTILE & APPAREL MACHINERY & EQUIPMENT

Textile Machinery in U.S. Mills

Narrow Fabric Machinery in Place At End of Year, 1981-1983

	1983	1982(r)	1981
Narrow fabric machinery, total	3,790	3,661	4,430
Tape looms	2,404	2,373	2,920
Webbing looms	1,327	1,130	1,383
Multiple or gang shuttle elastic looms	279	369	470
Shuttless elastic looms	3,445	3,301	3,355
Braiders	68,263	68,777	68,563

(r) revised.

Source: U.S. Bureau of the Census,
Current Industrial Reports (MQ-22T, MA-22G).

TEXTILE MACHINERY INDUSTRY

According to the International Trade Administration, U.S. Department of Commerce (1985 U.S. Industrial Outlook), industry shipments for all products and services supplied by the U.S. textile machinery industry, after adjusting for inflation, rose 5% from 1983 reversing 4 consecutive years of declining sales. An increase of 3.2% in terms of constant dollars was projected for 1985 over 1984. From 1985 through 1989, according to the ITT, textile machinery shipments are expected to increase 2 to 3% annually in constant dollars.

Based on the recently-issued final industry report from the 1982 census of manufactures, the industry profile was as follows.

Textile Machinery Industry (SIC 3552*), 1977, 1982

	1982	1977	% Change
Companies (number)	512	599	- 14.5%
Establishments (business locations)	551	638	- 13.6
With 20 employees or more	197	217	- 9.2
All employees (thousands)	19.4	25.9	- 25.1
Production workers	12.8	18.3	- 30.0
Payrolls (millions of $)	322.9	300.8	+ 7.3
Value added by manufacture (millions of $)	641.4	539.4	+ 18.9
Value of shipments (millions of $)	1,059.0	950.0	+ 11.5
New capital expenditures (mil. of $)	46.1	32.2	+ 43.2

* SIC (Standard Industrial Classification) Industry 3552 covers establishments primarily engaged in manufacturing machinery for the textile industries, including parts, attachments and accessories. Domestic and industrial sewing machines are not included.

(For an explanation of other terms in the above table, see 3 and 4.)

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982,
Industry Series, (MC82-1-35D).

TEXTILE MACHINERY INDUSTRY

Product Shipments

According to the ITA, the value of textile machinery shipped by all producers, regardless of industry classification, amounted to $1.0 billion in 1984, 8.0% above the 1983 estimate of $944 million. On a constant dollar basis, 1984 sales were 4.9% above 1983, and an increase of 3.2% is projected for 1985. Future markets for U.S. textile machinery include retooling existing textile mills and automating equipment in place. The U.S. represents the largest single market for textile machinery, despite the inroads of textile imports and imports of weaving and spinning equipment. The U.S. is strongest in yarn processing and preparation equipment and in finishing/dyeing equipment.

Major types of textile machinery and equipment shipped in 1982, based on census of manufactures reports, include the following.

Value of Shipments of Textile Machinery & Equipment
By All U.S. Producers, 1977, 1982
(Millions of dollars)

	1982	1977
Total shipments	$ 965.5	$ 857.1
Textile machinery	454.3	361.6
Parts & attachments	390.0	405.2
Type not specified	121.3	90.3

Source: U.S. Bureau of the Census,
Census of Manufactures,
Industry Series (MC 82-1-35D).

Exports

According to the ITA, exports represented about 25% of product shipments in 1984, reaching a total value of $255 million. This was 25.8% above the 1983 total, but 5.7% below the 1982 value of exports. However, exports were expected to increase by more than 5% in 1985, according to the ITT, dominated by parts and accessories for U.S. equipment already in place overseas.

Canada is the largest single customer for U.S. machinery and equipment, accounting for 17% of U.S. textile machinery exports in 1984. Other leading markets include West Germany (8%), United Kingdom (7.9%), and the Republic of China (4%).

Imports

The value of textile machinery and equipments imports into the U.S. reached $860 million in 1984, jumping 23.2% over the 1983 total, according to the ITT. Over 26% of these imports are in weaving equipment and parts and about 16% in spinning equipment and parts.

The ITA looks for a gain of about 4.7% in value of imports in 1985 compared with 1984, bringing the total to some $900 million, as acceptance of U.S. technological developments in a wide range of machinery applications and adaptations becomes more widespread. However, the poor textile climate in the U.S. and the strength of the dollar in Europe may result in a disappointing year for some overseas producers.

FAIRCHILD FACT FILES CURRENTLY AVAILABLE

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans. (August)

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1984 Edition available now--1985 Edition will be available in February, 1986)

DEPARTMENT STORE SALES: (Including selected major apparel specialty store sales) Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sale information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1984 Edition available now--1985 Edition will be available in January, 1986)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and buying habits. (1984 Edition available now--1985 Edition will be available in August, 1985).

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRICAL HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more. (Includes a new consumer buying intention survey) (October)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: (Including Tailored Casual Wear) Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits. (November)

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits.

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations, of the large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Also covered are developments in brand name merchandising, store labels, designer labels, licensing and off-price retailing.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and physical fitness.

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

A STATISTICAL ANALYSIS OF RETAILING: A detailed statistical summary of retail trade in the U.S. based on findings in the 1982 Census of Retail Trade issued this year by the U.S. Census Bureau. Includes information on the number of outlets by store type, sales, market shares by type of major merchandise classification, sales concentration by size of retail organization, geographical changes, etc. Comparisons are made with findings in the last previous census, covering operations in 1977. (December)

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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WOMEN'S COATS, SUITS & RAINWEAR

Market Trends

Due primarily to the interest of working women in more conservative, professional-looking apparel with a familiar brand name, retailers of women's coats and suits, as well as rainwear are predicting that sales' gains in 1985 should register more than 10% compared with 1984. After reporting one of their best spring seasons in recent history, many retailers are said to be writing orders for the fall 1985 season for as much as 25% greater than last year.

Despite the growth of the industry at retail, not all manufacturers are sharing equally in the growth. Surging imports are seen as siphoning off an increasing portion of domestic spending. As a result of this, production, employment and shipments have all declined in 1984, with the trend continuing through the first quarter of 1985.

Many in the women's coat and suit industry are still attempting to recover from a difficult year in 1984, one which was marked by over-stocked inventories and severe price cutting to clear unwanted goods. However, as 1985 progresses, retailers report they are working closer with suppliers to avoid a repeat of this situation.

The influx of designers into the coat and suit market has been a tremendous plus for retailers. Customers are becoming more aware of quality and associating it with designers, and thus demanding more designer products in this category.

Color has become a key to growth in the coat & suit industry, though retailers report that new--not wild--is what is creating sales. Other major factors in promoting growth for the industry are more and better tweeds, luxurious fabric treatments and roomy, but not over-sized, shapes.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

The International Trade Administration, U.S. Department of Commerce, reports in the 1985 U.S. Industrial Outlook that industry shipments in the women's suit & coat industry surpassed $5 billion in 1984. In current dollar terms, the ITA estimates that the value of industry shipments rose 4.2% between 1983 and 1984; while on a constant (1972) dollar basis, the rise was estimated to be 1.8%. Overall the industry has registered a growth rate in real terms of 5.1% per year on the average between 1977 and 1982.

GENERAL INDUSTRY STATISTICS

Estimated Value of Industry Shipments
Women's, Misses' & Juniors' Suit & Coat Industry (SIC 2337)*
1983, 1984
(Billions of dollars)

Current Dollars		Constant (1972) Dollars		Compound Annual Growth Rate**	
1984	1983	1984	1983	1972-1982	1977-1982
$5,007	$4,805	$3,509	$3,447	+ 6.6%	+ 5.1%

** In constant (1972) dollars.

Source: U.S. Department of Commerce,
International Trade Administration,
1985 U.S. Industrial Outlook.

The 1982 census of manufactures compiled by the U.S. Census Bureau covers the latest available information on the women's, misses' and juniors' suit and coat industry, as well as the waterproof outergarments industry at the manufacturer level. The census is conducted every five years, e.g.: the census previous to 1982 covered the 1977 operations.

The Census Bureau reports that between 1977 and 1982, the value of industry shipments in the suits and coats segment rose 67.5%, while the rainwear group, industry shipments were up 28.8%. Value added by manufacture also rose significantly during this period, rising 44.4% in the suit and coat industry and 26.5% in the rainwear industry.

The number of companies involved in the production of waterproof outerwear fell by more than one-third between 1977 and 1982, according to the Census Bureau, while the number of establishments (plants) declined by about one-third. In the suit and coat segment the decline was less dramatic. The number of companies was off 8.4%, while the number of plants fell 9.8%.

Women's & Misses Suits and Coats (SIC 2337*)

	1982	1977	% Change 1982/1977
Number of companies	1,431	1,563	- 8.4%
Number of establishments, total	1,512	1,677	- 9.8
Number with 20 or more employees	900	1,071	- 16.0
Employees, total (thous.)	78.2	84.9	- 7.9
Production workers (thous.)	63.2	72.8	- 13.2
Payroll (mil. $)	$ 871.1	$ 655.3	+ 32.9
Value added by manufacture # (mil. $)	2,067.1	1,432.0	+ 44.4
Value of industry shipments ## (mil. $)	4,886.7	2,917.3	+ 67.5
Capital expenditures, new (mil. $)	30.5	22.0	+ 38.6

(continued)

GENERAL INDUSTRY STATISTICS

Raincoats & Other Waterproof Outer Garments (SIC 2385*)

	1982	1977	% Change 1982/1977
Number of companies	98	155	- 36.8%
Number of establishments, total	112	167	- 32.9
Number with 20 or more employees	76	105	- 27.6
Employees, total (thous.)	9.3	12.0	- 22.5
Production workers (thous.)	8.0	10.1	- 20.8
Payroll (mil. $)	$ 101.1	$ 89.4	+ 13.1
Value added by manufacture # (mil. $)	246.0	194.4	+ 26.5
Value of industry shipments ## (mil. $)	449.2	348.8	+ 28.8
Capital expenditures, new (mil. $)	4.6	5.6	- 17.9

* Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, as shown below:

SIC 2337 comprises establishments primarily engaged in manufacturing women's, misses' and juniors' suits, coats, pantsuits and skirts, except fur and leather coats and raincoats. (Apparel made in knitting mills is not included).

SIC 2385 comprises establishments primarily engaged in manufacturing raincoats from purchased rubberized fabrics and other waterproof outer-garments made from such materials as pliofilm and cellophane. The industry includes manufacturers of garments for men, women and children. It does not include vulcanized rubber garments or rubberized fabric garments produced by fabric manufacturers in the same plant.

# Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished goods inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

## Value of industry shipments (as distinct from "product shipments") includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary products and secondary products made by manufacturers in these industries. The value of shipments of specified garments by all producers, (product shipments), including manufactures classified in other industries, are covered on page 11.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982.

GENERAL INDUSTRY STATISTICS

Industry Concentration

Manufacturers of women's suits, coats and rainwear tend to be smaller operations of less than 100 employees, but it is the larger operations which garner a majority of industry shipments. According to Sales & Marketing Management magazine, plants with 100 or more employees accounted for 58% of shipments of suits and coats in 1984, while plants of the same size in the rainwear industry were responsible for 73% of shipments in that same year.

The latest detailed information on the number of manufacturing operations by employment size comes from the 1982 census of manufactures. According to this source, in 1982, plants with less than 100 employees accounted for 87.2% of all establishments, yet they accounted for only 49.3% of shipments in 1982. Detailed results of the census are summarized below.

Manufacturing Establishments in the Women's & Misses' Suit & Coat Industry & in the Waterproof Outergarment Industry by Employment Class Size, 1982

Industry	Establishments		Employees		Shipments	
	No.	% of Total	No. (Thous.)	% of Total	Mil. $	% of Total
Women's & misses' coats & suits (SIC 2337*), total	1,512	100.0%	78.2	100.0%	$4,886.7	100.0%
By establishment size:						
Under 20 employees	612	40.5	5.0	6.4	520.4	10.6
20-49 employees	432	28.6	14.1	18.0	748.9	15.3
50-99 employees	274	18.1	19.2	24.6	1,142.2	23.4
100 or more employees	194	12.8	39.9	51.0	2,475.1	50.6
Waterproof outergarments (SIC 2385*), total	112	100.0%	9.3	100.0%	$ 449.2	100.0%
By establishment size:						
Under 20 employees	36	32.2	(D)	--	(D)	--
20-99 employees	52	46.4	2.5	26.9	92.6	20.6
100-249 employees	12	10.7	1.7	18.3	73.1	16.3
250 or more employees	12	10.7	(D)	--	(D)	--

* For a definition of these SIC codes, see page 3.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982,
Industry Series.

GENERAL INDUSTRY STATISTICS

Industry Concentration (continued)

Employment & Share of Shipments in Large Plants, 1984

	No. of Plants		Total Shipments (Mil. $)	% of Shipments From Plants With 100+ Employees
	With 20+ Employees	With 100+ Employees		
Women's, misses' & juniors' Suits & coats (SIC 2337*)	509	129	$3,991.6	58%
Waterproof outergarments (SIC 2385*)	105	37	$ 395.0	73%

* For a definition of these SIC codes, see page 3.

Source: Sales & Marketing Management,
Survey of Industrial Purchasing Power 1985.
(All rights reserved).

Employment & Earnings

Between April 1984 and 1985, total employment in the women's, misses' and juniors' suit and coat industry declined 5.5% falling to 49,500 persons. This decline followed a decline of 0.9% registered for the annual total for 1983 and 1984. Production worker employment registered a much steeper decline fall of 6.3% between April 1984 and 1985 after a decline of 3.1% between 1983 and 1984.

It should be noted that the Bureau of Labor Statistics uses a different methodology in compiling employment data than the one used by the Census Bureau. Thus, the figures of these two sources are not directly comparable.

Employment & Earnings in the Women's, Misses' & Junors' Suit & Coat Industry (SIC 2337*)

	April Average		% Change	Annual Average		% Change
	1985	1984	1985/84	1984	1983	1984/83
All employees (thous.)	49.5	52.4	- 5.5%	56.2	56.7	- 0.9%
Production workers (thous.)	40.3	43.0	- 6.3	46.3	47.8	- 3.1
Av. weekly earnings	$211.20	$205.70	+ 2.7	$211.01	$202.30	+ 4.3
Av. hourly earnings	6.40	6.05	+ 5.7	6.17	5.95	+ 3.7
Av. weekly hours	33.0	34.0	- 2.9	34.2	34.0	+ 0.6

* Includes skirts. See page 3.

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings.

GENERAL INDUSTRY STATISTICS

By Region

New York is the leading state in shipments of both women's suits & coats as well as the waterproof outergarment industry, in 1982, according to the 1982 census of manufactures compiled by the U.S. Census Bureau, New York accounted for 36.1% of plants while representing 34.1% of women's suits & coat shipments. In the waterproof outergarments area, New York represented 21.4% of plants and 14.0% of industry shipments.

Leading Manufacturing States in the Women's Suits, Coats & Rainwear Industry, 1982

	No. of Establishments		Value Added by Manufacture (Mil. $)	Value of Industry Shipments (Mil. $)
	Total	With 20+ Employees		
Women's & misses' suits & coats (SIC 2337)*				
U.S. total	1,512	900	$2,067.1	$4,886.7
Leading states:				
New York	547	250	588.5	1,665.3
New Jersey	231	156	280.8	624.0
California	171	85	309.8	661.3
Massachusetts	126	92	189.9	502.8
Pennsylvania	82	67	164.5	376.4
Florida	53	33	40.4	81.6
Texas	43	29	59.9	123.4
Connecticut	31	21	29.8	92.0
Illinois	20	13	26.3	51.2
Missouri	20	14	35.1	55.5
North Carolina	20	17	52.3	82.0
Leading states total	1,344	777	1,777.3	4,315.5
Percent of U.S. total	88.9%	86.3%	86.0%	88.3%
Waterproof outergarments (SIC 2385*)				
U.S. total	112	76	246.0	449.2
Leading states				
New York	24	16	23.3	62.9
Massachusetts	12	9	22.4	32.7
Maryland	11	10	(D)	(D)
New Jersey	9	6	11.9	23.4
Georgia	6	5	7.9	14.6
Florida	5	5	5.4	6.4
Leading states total	67	51	na	na
Percent of U.S. total	59.8%	67.1%	--	--

na--not available
(D)--Withheld to avoid disclosure

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982,
Industry Series.

PRODUCTION

Current information on U.S. apparel production is compiled by the Census Bureau through surveys among manfuacturers, government contractors and jobbers. This is completed with the exception of very small firms (generally less than five employees), which were, however, covered in the 1982 complete census of manufactures. The current data is covered in the Current Industrial Reports series, and includes garments which are cut in the U.S., sent outside the country, and then imported as finished garments under the provisions of Item 807.00 of the Tariff Schedule.

In the CIR data, reported below, suits include tailored suits and tailored uniforms (not washable types), but excludes pantsuits, jumpsuits and coordinate suit sets that can be purchased as separate pieces. The coat classification includes toppers, car coats, suburban coats, plastic coats, and water repellent coats and capes, but excludes raincoats, which are separately reported. The pants group includes jean-cut casuals and other tailored pants. It does not include jeans and dungarees, which are covered in the Women's Sportswear Fact File.

The CIR reports on women's outerwear, which has recently been released covering 1984 production and shipments, shows the downward trend in domestic output under pressure from imports. According to a study by the ILGWU covering the first 4 months of 1985 production and employment in the women's and children's wear industry, they continued to decline. The domestic coat industry registered the largest decline in unit production, dropping 36.4%--from 2.2 million pieces in the first 4 months of 1984 to 1.4 million in the same 1985 period. Women's suits showed the smallest loss in production, about 4%, followed by slacks and jeans, down 6.3%.

Production of Women's, Misses' & Juniors' Coats, Suits & Related Apparel Total & By Construction/Fabric Type, 1983, 1984

(Thousands of units)

	1984	1983	% Change 1984/83
SUITS	11,327	13,448	- 16.0%
Pantsuits (including jumpsuits)	3,722	4,458	- 16.5
By construction:			
Woven fabric	1,301	1,721	- 24.4
Knit fabric	1,794	1,555	+ 15.4
Construction n.s.k	627	1,182	- 47.0
By fabric:			
All cotton and chiefly cotton	299	174	+ 71.8
All manmade and chiefly manmade	2,278	1,715	+ 32.8
All wool and chiefly wool			
All other fabric	428	401	+ 6.7
Fabric n.s.k.	717	2,168	- 66.9

(continued)

Production of Women's, Misses' & Juniors' Coats, Suits & Related Apparel Total & By Construction/Fabric Type, 1983, 1984

(Thousands of units)
(continued)

	1984	1983	% Change 1984/83
SUITS (cont'd.)			
Suits, except pantsuits	7,605	8,990	- 15.4%
By construction:			
Woven fabric	3,485	4,056	- 14.1
Knit fabric	1,238	1,816	- 31.8
Construction n.s.k.	2,885	3,748	- 23.0
By fabric:			
All cotton and chiefly cotton	222	261	- 14.9
All manmade and chiefly manmade	3,596	3,836	- 6.3
All wool and chiefly wool	1,313	1,408	- 6.7
All other fabric			
Fabric n.s.k.	2,474	3,485	- 29.0
COATS (except down or feather-filled, fur, all leather & raincoats)	11,934	11,994	- 0.5
By construction:			
Woven fabric	10,573	10,591	- 0.2
Knit fabric	101	162	- 37.7
Construction n.s.k.	1,260	1,241	+ 1.5
By fabric:			
All cotton and chiefly cotton	57	127	- 55.1
All manmade and chiefly manmade	na	na	--
All wool and chiefly wool	6,547	7,004	- 6.5
All other fabric	(D)	34	--
Fabric n.s.k.	776	751	+ 3.3
Coats and jackets of down & feather fill	1,232	na	--
By fabric:			
All cotton and chiefly cotton	362	na	--
Fabric n.s.k.	103	na	--
JACKETS	33,014	37,675	- 12.4
Separate tailored suit type jackets	30,457	34,303	- 11.2
By construction:			
Woven fabric	18,588	21,433	- 13.3
Knit fabric	7,685	8,735	- 12.0
Construction n.s.k.	4,184	4,125	+ 1.4
By fabric:			
All cotton and chiefly cotton	2,278	3,349	- 32.0
All manmade and chiefly manmade	19,885	20,144	- 1.3
All wool and chiefly wool	4,484	5,709	- 21.5
All other fabric	343	370	- 7.3
Fabric n.s.k.	3,467	4,731	- 26.7

(continued)

Production of Women's, Misses' & Juniors' Coats, Suits & Related Apparel
Total & By Construction/Fabric Type, 1983, 1984

(Thousands of units)
(continued)

	1984	1983	% Change 1984/83
JACKETS (Cont'd.)			
Nontailored outer jackets, excluding ski	2,557	3,372	- 24.2%
By construction:			
Woven fabric	1,281	1,546	- 17.1
Knit fabric			
Construction n.s.k.	1,276	1,826	- 30.1
By fabric:			
All cotton and chiefly cotton	185	108	- 26.6
All manmade and chiefly manmade	1,203	1,740	- 30.9
All wool and chiefly wool			
All other fabric	175	231	- 24.2
Fabric n.s.k.	994	1,149	- 13.5
VESTS, excluding sweater vests	1,416	1,940	- 27.0
By construction:			
Woven fabric	435	590	- 26.3
Knit fabric	722	1,083	- 33.3
Construction n.s.k.	259	267	- 3.0
By fabric:			
All cotton and chiefly cotton	185	108	+ 46.3
All manmade and chiefly manmade	330	1,124	- 71.6
All wool and chiefly wool	88	69	+ 27.5
All other fabric			
Fabric n.s.k.	783	789	- 0.8
RAINCOATS	3,833	4,116	- 6.9
Uncoated fabric:			
All manmade and chiefly manmade	3,237	3,562	- 9.1
All other fabric, n.s.k.	596	554	+ 7.6
SKIRTS	98,554	101,499	- 2.9
By construction:			
Woven fabric	71,927	71,015	+ 1.3
Knit fabric	15,521	18,941	- 18.1
Construction n.s.k.	11,096	11,543	- 3.9
By fabric:			
All cotton and chiefly cotton	17,510	17,217	+ 1.7
All manmade and chiefly manmade	58,417	58,158	+ 0.4
All wool and chiefly wool	11,188	13,716	- 18.4
All other fabric	1,263	1,534	- 17.7
Fabric n.s.k.	7,166	10,874	- 34.1

(continued)

PRODUCTION

Production of Women's, Misses' & Juniors' Coats, Suits & Related Apparel Total & By Construction/Fabric Type, 1983, 1984

(Thousands of units)
(continued)

	1984	1983	% Change 1984/83
PANTS (not including dungarees & jeans)	161,995	173,169	- 6.5%
By construction:			
Woven fabric	106,154	109,829	- 3.3
Knit fabric	38,772	45,833	- 15.4
Construction n.s.k.	17,069	17,507	- 2.5
By fabric:			
All cotton and chiefly cotton	28,406	26,251	+ 8.2
All manmade and cheifly manmade	110,872	122,568	- 9.5
All wool and chiefly wool	8,271	9,116	- 9.3
All other fabric	956	1,259	- 24.1
Fabric n.s.k.	13,490	13,975	- 3.5

n.s.k.--not specified by kind
na--not available
(D)--Withheld to avoid disclosure

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Women's & Children's Outerwear (MA23F).

Seasonality in Production

The Census Bureau compiles monthly estimates on U.S. production in selected apparel categories in the CIR Series. Based on this data, the following traces the pattern in production in U.S. plants on a monthly basis in 1984.

Percent of Reported Cutting by Month, 1984

	Coats, exc. Raincoats	Suits, incl. Pants Suits	Skirts	Tailored Jackets
Total	100.0%	100.0%	100.0%	100.0%
January	4.6	8.6	8.9	9.4
February	5.2	9.7	9.5	9.3
March	5.9	10.4	9.7	9.3
April	6.3	9.0	8.2	8.6
May	10.2	9.4	10.0	8.9
June	11.0	7.8	8.8	8.6
July	11.3	6.8	7.2	8.5
August	13.0	7.4	9.0	8.7
September	13.1	6.7	8.3	8.1
October	10.3	8.4	7.9	7.7
November	5.3	8.6	6.4	6.5
December	3.8	7.2	6.1	6.4

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's, Women's, Misses' & Juniors' Selected Apparel
M23(85)-1, March 1985.

PRODUCTION

Materials Consumed in Production

Materials Consumed in Production of Specified Women's Coats, Suits & Rainwear 1977, 1982
(Delivered cost in millions of dollars)

	1982	1977	% Change 1982/1977
Women's & misses' suits & coats, total	$1,642.6	$ 941.8	+ 74.4%
Broad woven fabrics	567.7	412.7	+ 37.6
Purchased knitted fabrics	107.9	182.5	- 40.9
All other materials, components, parts containers and supplies	234.2	93.6	+150.2
Materials containers & supplies, n.s.k.	732.8	253.0	+189.6
Waterproof outergarments, total	157.1	105.2	+ 49.3
Broadwoven fabrics		51.6	
Purchased knitted fabrics	99.8	3.3	+ 81.8
All other materials, components, parts containers & supplies	35.2	21.7	+ 62.2
Materials, containers & supplies, n.s.k.	22.1	28.6	- 22.7

n.s.k.--not specified by kind

Source: U.S. Bureau of the Census,
1982 Census of Manufactures,
Industry Series.

PRODUCT SHIPMENTS

Product shipments include all products of a specified type, regardless of the industry/classification of the producer, in contrast with industry shipments which cover the products made within a specific industry classification. For reporting purposes under the Census Bureau system, a manufacturer is classified in only one industry, based on its primary product.

The total value of shipments of women's, misses' and juniors' suits, coats, skirts, etc., amounted to $4.3 billion in 1982, representing a gain of 52.7% compared with 1977, according to the Census Bureau. These figures are, of course, in current dollars, and inflation accounts for much of the gain.

The International Trade Administration (U.S. Department of Commerce) estimates that in terms of constant (1972) dollars, the value of shipments of coats and suits by all producers gained 4.3% in 1983 compared with 1982, but declined 8.5% in 1984, compared with 1983.

The most detailed information on a specific product basis is from the 1982 census of manufactures. These reflect the fall from favor of pantsuits. The value of shipments of these dropped 74.8% (current dollars) in 1982, compared with 1977.

PRODUCT SHIPMENTS

Value of Shipments of Product Classes, 1977, 1982
(Millions of dollars)

	1982	1977	% Change 1982/1977
Women's, misses' & juniors suits coats, etc., total	$4,325.0	$2,831.8	+ 52.7%
Coats, exc. fur, leather & rain	621.9	612.1	+ 1.6
Suits, total	443.2	768.9	- 42.3
Pantsuits	90.8	360.6	- 74.8
All other suits	341.8	349.8	- 2.3
Separate skirts & jackets	2,351.2	741.0	+217.3
Separate skirts	1,266.4	462.0	+174.1
Separate tailored suit jackets	892.1	238.8	+273.6
Nontailored outer jackets, exc. ski	106.3	66.8	+ 59.1
Vests, exc. sweater vests	24.4	na	--
Contract work on suits, coats & skirts	513.7	423.9	+ 21.2
Suits, coats & skirts, n.s.k.	395.1	285.9	+ 38.2
Waterproof outer garments (women's, misses' and juniors)	186.5	153.2	+ 21.7

n.s.k.--not specified by kind
na--not available

Source: U.S. Bureau of the Census,
1982 Census of Manufactures,
Industry Series.

Later data on the value of product shipments is available from the Census Bureau in the *Current Industrial Report* series. The only category to record an increase in the value of shipments in 1984 is coats. Every other category recorded declines between 1983 and 1984, with the drops ranging from 2.3% to 31.1%.

Overall, the value of product shipments of women's suits, coats, and related products was $5.0 billion, a decline of 4.5% from the previous year.

PRODUCT SHIPMENTS

Value of Shipments of Specified Products, 1983, 1984
(Millions of dollars)

	1984	1983	% Change 1984/1983
Women's, misses' & juniors' suits, coats, etc., total	$4,977.7	$5,209.9	- 4.5%
Suits, total	400.5	443.8	- 9.7
Pantsuits	80.6	89.3	- 9.7
Other suits	320.0	354.5	- 9.7
Coats, exc. fur, leather & rain	660.3	612.5	+ 7.8
Raincoats	168.1	176.5	- 4.8
Jackets, total	875.7	1,013.0	- 13.6
Separate, tailored type	812.8	921.6	- 11.8
Nontailored outer jackets, excluding ski	62.9	91.4	- 31.1
Vests, excluding sweater vests	16.8	17.5	- 4.0
Skirts	1,290.3	1,343.3	- 3.9
Slacks & pants	1,565.9	1,603.3	- 2.3

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Women's and Children's Outerwear (MA-23F).

By Geographic Area

New York was the leading state for shipments in three of the five categories measured by the Census Bureau in the 1982 census of manufactures. In the remaining two categories, New York ranked second. New Jersey was the leader in shipments of commission work on women's, misses' & juniors' suits, coats and skirts, while Maryland led in raincoats & waterproof outergarments.

Value of Product Shipments of Coats, Suits, Rainwear & Related Products by Leading States, 1977, 1982
(Millions of dollars)

	Value of Shipments		% Change
	1982	1977	1982/1977
Women's & misses' coats, (except fur & leather)			
United States total	$621.9	$612.1	+ 1.6%
Leading States:			
New York	298.6	333.4	- 10.4
New Jersey	86.5	60.1	+ 43.9
Massachusetts	59.7	31.5	+ 89.5
California	57.1	61.2	- 6.7
Missouri	23.5	38.8	- 39.0
Illinois	21.7	17.4	+ 24.7
Leading States total	547.1	542.4	+ 0.9
Percent of U.S. total	88.0%	88.6%	--

(continued)

PRODUCT SHIPMENTS

By Geographic Area (continued)

Value of Product Shipments of Coats, Suits, Rainwear & Related Products by Leading States, 1977, 1982
(Millions of dollars)

	Value of Shipments		% Change
	1982	1977	1982/1977
Women's, misses & juniors' suits			
United States total	$407.1	$671.9	- 39.4%
Leading States:			
New York	171.8	208.6	- 17.6
Pennsylvania	38.0	43.4	- 12.4
California	37.3	100.0	- 62.7
Connecticut	22.4	na	--
Florida	21.4	29.2	- 26.7
Massachusetts	17.4	15.9	+ 9.4
Illinois	10.8	6.2	+ 74.2
Leading states total	319.1	na	--
Percent of U.S. total	73.4%	na	--
Women's, misses' & juniors' skirts & jackets			
United States total	2,315.2	741.0	+212.4
Leading States:			
New York	725.0	219.0	+231.1
California	349.0	94.0	+271.3
New Jersey	290.6	37.0	+685.4
Massachusetts	240.6	125.0	+ 92.5
Pennsylvania	155.2	65.8	+135.9
North Carolina	86.0	19.8	+224.3
Leading states total	1,846.4	560.6	+229.4
Percent of U.S. total	79.8%	75.7%	--
Commission work on women's, misses' & juniors' coats, suits & skirts			
United States total	513.7	423.9	+ 21.2
Leading states:			
New Jersey	101.6	85.9	+ 18.3
New York	99.8	88.1	+ 13.3
Massachusetts	63.5	45.5	+ 39.6
Pennsylvania	51.9	29.5	+ 75.9
California	40.2	33.2	+ 21.1
Florida	21.9	12.1	+ 81.0
Leading states total	378.9	294.3	+ 28.7
Percent of U.S. total	73.8%	69.4%	--

(continued)

PRODUCT SHIPMENTS

By Geographic Area (continued)

Value of Product Shipments of Coats, Suits, Rainwear & Related Products by Leading States, 1977, 1982
(Millions of dollars)
(continued)

	Value of Shipments		% Change
	1982	1977	1982/1977
Raincoats & other waterproof outerwear			
United States total	$357.0	na	--
Leading states:			
Maryland	133.9	na	--
New York	53.7	na	--
Massachusetts	24.2	na	--
Florida	8.3	na	--
California	2.5	na	--
Leading states total	222.6	na	--
Percent of U.S. total	62.4%	--	--

na--not available

Source: U.S. Bureau of the Census, Census of Manufactures, 1982, Industry Series.

PRODUCER PRICES

The producer (factory) price for women's, misses' & juniors' skirts rose 1.0% between May 1984 and 1985, while the producer price for suits rose 1.9% during the same period according to data released from the Bureau of Labor Statistics. The producer price for all women's, misses' and juniors' apparel was up 1.2% during this same period.

For the full year 1984, the producer price for skirts rose 2.2%, while that of coats increased by 0.2%.

Producer Price Indexes for Specified Types of Women's Wear
(1967 = 100)

	May Average			Annual Average		
	1985	1984	% Change 1985/84	1984	1983	% Change 1984/83
Women's, misses' & juniors' apparel	181.6	179.6	+ 1.0%	179.4	176.8	+ 1.5%
Skirts	129.5	126.0	+ 2.8	126.1	123.4	+ 2.2
Coats	148.9	146.1	+ 1.9	144.7	144.4	+ 0.2
Suits	100.0	na	--	na	na	--

na--not available

Source: U.S. Bureau of Labor Statistics.

FOREIGN TRADE

Estimates on imports in the women's, misses' & juniors' suits and coats industry by the International Trade Administration indicate that on a current dollar value basis, imports rose 43.1% between 1983 and 1984 amounting to $1.2 billion. Between 1977 and 1984, the ratio of imports to new supply more than doubled, climbing from 9.7% to 23.4%.

Exports in this industry, on the other hand, have been declining since 1981. During this period, exports as a percent of shipments fell from 1.3% to 0.8%.

Women's, Misses' & Juniors' Coat and Suit Supply Situation 1982 - 1984
(Values in millions of dollars)

	1984	1983	1982
Value of imports	$1,266	$ 884.8	$ 778.7
Imports as a % of new supply	23.4%	17.9%	16.6%
Value of exports	$ 29.9	30.2	$ 34.1
Exports as a % of shipments	0.8%	0.8%	0.9%

Source: 1985 U.S. Industrial Outlook,
International Trade Administration.

Imports

According to the U.S. Department of Commerce, every measured category of imports in suits, coats, skirts and rainwear recorded a gain of at least 25% in dollar value between 1983 and 1984. The fastest growing segment of the industry, import wise, was the knit wool skirt area which recorded an increase of 168.5% in dollars and 149.4% in units. In second position were raincoats, which had a growth rate of 70.5% in dollars and 63.5% in units.

Quantity & Value of Imports of Women's, Misses' & Juniors'
Coats, Skirts & Raincoats, 1983, 1984

	Quantity (Thous. doz.)		% Change	Value C.I.F.* (Thous. $)		% Change
	1984	1983	1984/83	1984	1983	1984/83
Coats, total	5,323,225	4,591,659	+ 15.9%	$757,592	$611,628	+ 23.9%
Not knit						
Wool	318,434	231,111	+ 37.8	97,649	64,639	+ 51.0
Cotton, 3/4 length or longer	320,278	221,379	+ 44.7	70,646	50,882	+ 38.8
Other cotton	1,760,775	1,378,481	+ 27.7	240,250	181,424	+ 32.4
Manmade	2,923,738	2,760,688	+ 5.9	323,327	301,548	+ 83.2
Raincoats, 3/4 length or longer	266,266	162,875	+ 63.5	51,091	29,971	+ 70.5

(continued)

Imports (continued)

Quantity & Value of Imports of Women's, Misses' & Juniors' Coats, Skirts & Raincoats, 1983, 1984
(continued)

	Quantity (Thous. doz.) 1984	Quantity (Thous. doz.) 1983	% Change 1984/83	Value C.I.F.* (Thous. $) 1984	Value C.I.F.* (Thous. $) 1983	% Change 1984/83
Skirts, total						
Not knit						
Wool	275,868	212,227	+ 30.0	52,209	35,365	+ 47.6
Cotton	2,011,714	1,540,203	+ 30.6	137,624	93,951	+ 46.5
Manmade	1,105,330	821,735	+ 34.5	78,535	55,888	+ 40.5
Knit						
Cotton or manmade	431,176	313,670	+ 37.5	19,615	15,253	+ 28.6
Wool	77,369	31,021	+149.4	13,816	5,140	+168.8

* The c.i.f. value consists of the Customs value plus all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation ot the first port of arrival in the U.S.

Source: U.S. Bureau of the Census,
U.S. Imports (FT 135) December 1983, 1984.

According to an analysis of Census Bureau data by the ILGWU, imports of women's and children's coats and jackets rose from 42.9 million units in 1980 to a peak of 71.0 million units in 1984--representing a gain of 65.6%. Skirt imports rose from 14.8 million units in 1980 to 45.4 million in 1984, tripling in number. Imports of suits gained 70%, from 1.7 million units in 1980 to 2.9 million last year.

Census Bureau data shows the surge continuing in 1985. The ILGWU summary shows imports of women's and children's coats and jackets in the first four months of the year up 23% compared with the same 1984 period; suits, up 54%, skirts, 22.4%; and rainwear imports up 10.4%.

Exports

As previously noted, exports in the women's, misses' & juniors' industry have been extremely small and decreasing over the last several years. The U.S. International Trade Administration reports that in 1984 exports stood at $29.9 million, down from the $34.1 million reported in 1982.

The strong U.S. dollar, and competition from foreign producers are the major difficulty faced by the domestic industry in developing foreign markets.

THE POTENTIAL MARKET

The following table shows the demographic impact of the aging "baby boom" generation. Between 1984 and 1994, females in the 35-54 year old bracket will increase 33.5%. The only other age groups expected to record increases during this period are those under 15 years old, and those over 65.

By the year 2005, the number of women aged 35-54 will zoom 52.1% in numbers, surpassing the 30.9% growth in the over 65 year old bracket and the 30.1% growth in 54-65 year olds. The only categories expected to decline between 1984 and 2005 are the under 5 year olds (-4.3%) and 20-34 year olds (-14.4%), according to Census Bureau projections.

Female Population of the U.S., 1984 & Projections to 2005*
(In Millions)

	Number (Thousands)			% Change	Percent Distribution		
	1984	1994	2005	2005/1984	1984	1994	2005
Total, all ages	121,343	132,251	141,381	+ 16.5%	100.0%	100.0%	100.0%
Under 5 years	8,904	9,188	8,518	- 4.3	7.3	6.9	6.0
5 to 9 years	7,924	9,415	8,678	+ 9.5	6.5	7.1	6.1
10 to 15 years	10,236	10,745	11,167	+ 9.1	8.4	8.1	7.9
16 years & over	94,279	102,903	113,018	+ 19.9	77.7	77.9	80.0
16 - 19	7,357	6,426	7,707	+ 4.8	6.1	4.9	5.5
20 - 34	31,205	29,068	26,706	- 14.4	25.7	22.0	18.9
35 - 54	27,115	36,202	41,249	+ 52.1	22.3	27.4	29.2
55 - 64	11,834	11,002	15,399	+ 30.1	9.8	8.3	10.9
65 & over	16,678	20,205	21,957	+ 30.9	13.8	15.3	15.5
Median age (years)	32.4	35.6	39.2	+ 21.0	--	--	--

* Middle of a series of three different projections, each based on alternative assumptions for future fertility, mortality, and net immigration levels. Includes Armed Forces overseas.

Note: Columns may not add to totals shown due to rounding.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25, No. 952 (May 1984).

Working Women

During 1984, more than 51 million women were employed in the U.S. with 25 million of them working full-time, year round. This is the greatest number ever. Participation rates for women in the labor force now stand at about 66% compared to a rate for men of about 88%. However, the rate for women has been increasing steadily while that for men has remained stable, and thus the gap is narrowing.

According to the Bureau of Labor Statistics, over the next 15 years, the number of men at work will increase 13% while the increase in the number of women will be more than double that rate at 27%. Currently, there are 18 million more women at work then there were in 1970, and twice the number as in 1960.

Civilian Labor Force, by Sex, Age & Race, 1982 & Projections to 1995

	Labor Force (in thous.)			Labor Force Participation Rate*		
	1982	1990	1995	1982	1990	1995
Women by age 16 & over	47,755	57,250	61,417	52.6	58.3	60.3
16 to 19	4,056	3,778	3,761	51.4	56.8	58.2
20 to 24	7,477	7,035	6,796	69.8	78.1	82.0
25 to 34	13,393	16,804	16,300	68.0	78.1	81.7
35 to 44	9,651	14,974	17,427	68.0	78.6	82.8
45 to 54	7,105	8,718	11,125	61.6	67.1	69.5
55 to 64	4,742	4,888	4,671	41.8	41.5	42.5
65 & over	1,185	1,329	1,337	7.9	7.4	7.0

* Percent of civilian noninstitutional population in the labor force.

Source: U.S. Bureau of Labor Statistics,
Bulletin 2197 (March 1984).

Working Women

According to a survey by Celanese Marketing Co., professional women, such as attorneys and corporate executive types, spend over $5 billion on apparel, an amount expected to grow 8 to 10% annually through 1985. Informal professional women, such as social workers or teachers, spend $3.6 billion on apparel, and this is expected to grow 5 to 7% a year.

Size Distribution

The following table covers estimates of the current adult female population in specified height/weight groups, based on an analysis of information from the U.S. Department of Health and Human Services and the U.S. Census Bureau.

Some 12 million women in the U.S. population are likely candidates for petite sizes, while another eight million probably look for tall sizes. While other measurements do enter into the size definition, available data is limited to height and weight relationships. While there are 40 million women in the U.S. who are five feet three inches or shorter, most weigh over 120 pounds. Only 30% weigh less than 120 lbs.

Research conducted by Associated Merchandising Corp., a major department store operator, grouped American women into average size ranges. Four out of 10 wore junior sizes, 36% wore misses, 13% were in the petite size range and 11% were classified as large or half size wearers.

THE POTENTIAL MARKET

Working Women

Estimated Number of Women 16 Years of Age & Over
By Height & Weight, 1984
(In Thousands)

	Total	% of total	Under 120 lbs.	% of total	120-150 lbs.	% of total	150 lbs. & over	% of total
Total	94,279	100.0%	21,401	22.7%	41,860	44.4%	31,018	32.9%
Height:								
5'3" or less	51,476	54.6	15,462	16.4	21,496	22.8	14,519	15.4
5'4" - 5'6"	34,035	36.1	5,468	5.8	16,027	17.0	12,539	13.3
5'7" or more	8,768	9.3	471	0.5	4,337	4.6	3,960	4.2

Source: Fairchild Market Research Department based on National Health Survey 1971-1974 by the U.S. Dept. of Health and Human Services (formerly U.S. Dept. of Health, Education & Welfare) and U.S. Bureau of the Census projections for 1984 by age.

CONSUMER PRICES

Between April 1984 and April 1985, the consumer price index for women's and girls' coats and jackets, as well as the index for suits did not rise as rapidly as that for all women's and girls' apparel. While the index for all women's and girls' wear rose 3.8% during this period, that for coats and jackets was up only 0.7% while the index for suits declined 1.1%.

In 1984, the index for both the coats and jackets and the suits categories recorded declines (0.2% and 1.1% respectively), while the index for all women's and girls' wear rose 1.1%.

Consumer Price Index for Specified Women's Apparel Categories
(All Urban Consumers)

	April Average			Annual Average		
	1985	1984	% Change 1985/84	1984	1983	% Change 1984/83
Women's & girls apparel (1967 = 100)	170.8	164.5	+ 3.8%	163.6	161.8	+ 1.1%
Coats & jackets	171.3	170.1	+ 0.7	168.0	168.3	- 0.2
Suits	103.1	104.2	- 1.1	82.1	83.0	- 1.1

Source: U.S. Bureau of Labor Statistics.

RETAIL SALES

According to the Softgoods Outlook 1985, published by Kurt Salmon Associates, a New York-based consulting firm, retail sales of women's suits increased 39% between 1983 and 1984, while coat sales increases were reported at 25%. Rainwear sales were up 16% and skirt sales climbed 7%.

Sales projections for 1985, as noted below, indicate gains in all four measured categories, but not nearly as large as those recorded in 1984.

Retail Sales of Selected Women's Apparel Categories
(Percentage change in units purchased by consumers)

	Projected 1985/1984	1984/1983	1983/1982	1982/1981
Women's wear	+ 4%	+ 5%	+ 4%	+ 1%
Suits	+ 12	+ 39	+ 15	+ 25
Coats	+ 10	+ 25	+ 4	- 10
Skirts	+ 5	+ 7	+ 2	+ 3
Rainwear	+ 5	+ 16	+ 10	- 13

Source: Kurt Salmon Associates,
The Softgoods Outlook 1985,
(Based on MRCA Panel data).

RETAIL SALES BY STORE TYPE

Until reports on the 1982 census of retail trade are completed by the U.S. Census Bureau, available information on sales of women's suits, coats, etc. by outlet type is limited. Data previously published for 1977 will be revised, because of changes made by the Census Bureau in reporting on leased departments. In the 1982 census reports, these are counted as separate retail establishments, rather than incorporated in the store data in which they operated, as was originally reported for 1977.

According to preliminary data from the 1982 census of retail trade, sales of women's and girls' suits, sport coats and blazers represented 11.8% of the total sales of women's wear stores and 3.4% of family clothing store sales. For dress coats, jackets and rainwear, the Census Bureau reported percentages of 7.0% and 2.5%, respectively.

It must be noted that all reported figures on retail sales are preliminary and subject to revision, when final reports are released by the Census Bureau, later in 1985.

Department Stores

There were 10,035 department stores in operation in the U.S. in 1982, according to preliminary census of retail trade data, up from 8,807 in 1977. Sales, including leased departments, totaled $107.1 billion in 1982, up from $76.9 billion in 1977. Excluding leased departments, comparable figures were $99.1 billion and $71.0 billion respectively.

Department Stores (continued)

Current census bureau data, based on monthly retail sales reports, placed the total value of department store sales at $129.3 billion in 1984, up from $116.6 billion in 1983, including leased departments. Over the first seven months of 1985, department store sales are reported to be 5.6% over those of the first seven months of 1984.

Within department stores, as well as the larger specialty stores, the trend in recent years has been to make special efforts to attract career women by opening special shops, putting personal shoppers on the floor and adjusting store hours. Blazers, jackets, suits and skirts make up an important part of these special efforts.

Typical Operating Results

In line with this trend, the typical department store registered increases in every measured category of women's suits and coats, particularly suits according to the National Retail Merchants Association. According to the NRMA, the typical department store registered an increase of 56.7% in suit sales between 1982 and 1983. Women's suit sales averaged $221.9 per sq. foot in these stores.

Merchandising & Operating Results in Coat & Suit Departments, 1983
(Median Results for Department Stores With Sales Over $1 Million)

			Women's, Misses' & Juniors'		
	Adult Female Apparel Total	Coat & Suit Depts.*	Dressy & Tailored Coats	Jackets Casual & All-Weather Coats	Suits
(No. reporting companies)	95	72	69	51	45
Net sales, % chg. over last year	+ 10.3%	+ 8.5%	+ 9.2%	+ 8.0%	+56.7%
Net sales, % of adult female app.	100.0	9.5	2.6	1.7	0.6
Net sales, % of total store sales	25.9	2.1	1.1	0.7	0.2
$ sales per sq. ft. of selling space (main or largest unit)	$145.5	$171.0	$154.8	$178.4	$221.9
Cumulative markon, %	51.3	50.9	50.4	51.5	51.8
Gross margin, % of net sales (incl. cash discounts)	43.7	42.9	42.4	44.9	42.5
Markdowns, retail, % of net sales	22.5	21.5	22.1	21.1	27.1
Number of stock turns (times)	3.9	3.8	3.7	4.3	3.6
Selling salaries, % of sales (main or largest unit)	6.7	6.2	6.1	5.6	6.2
Sales promotion, % of net sales	3.0	3.7	3.9	4.4	3.7

* Women's & misses', not including juniors'.

Source: National Retail Merchants Association, Merchandising & Operating Results of 1983, (1984 Edition).

RETAIL SALES

Specialty Stores

The Nation's 17,899 family clothing stores with paid employees had sales of $13.5 billion in 1982. In 1977, 16,025 stores had sales of $7.8 billion. There were 44,084 women's ready-to-wear stores with paid employees in 1982, and their sales totaled $20.3 billion. In 1977, 40,227 stores had sales of $12.3 billion.

Percent of Total Store Sales, 1977, 1982

	Family Clothing Stores		Women's Ready-To-Wear Stores	
	1982	1977(r)	1982	1977(r)
Women's & girls'				
Coats, jackets, rainwear	2.5	4.6	7.0	12.3
Suits, sport jackets, blazers	3.4		11.8	

(r)--revised

Source: U.S. Department of Commerce, 1982 Census of Retail Trade (Preliminary reports).

Typical Operating Results

While sales increases of both women's, misses' & juniors' dressy and tailored coats and jackets, casual and all weather coats were better in the typical specialty store than in department stores, according to the NRMA, the increase for suits averaged below that of department stores.

Cumulative markon was highest in the jackets, casual & all-weather coats category (50.9%) followed by suits at 50.3%.

Detailed results from the NRMA are summarized below.

Merchandising & Operating Results in Coat & Suit Departments, 1983
(Median Results for Specailty Stores With Sales Over $1 Million)

	Adult Female Apparel Total	Coat & Suit Depts.*	Women's, Misses' & Juniors'		
			Dressy & Tailored Coats	Jackets Casual & All-Weather Coats	Suits
(No. reporting companies)	34	22	20	10	12
Net sales, % chg. over last year	+ 9.5%	+ 5.3%	+10.0%	+ 9.2%	+12.0%
Net sales, % of adult female app.	100.0	14.2	4.0	2.7	1.3
Net sales, % of total store sales	54.0	8.3	2.6	1.7	0.9
$ sales per sq. ft. of selling space (main or largest unit)	$143.9	$163.6	$142.0	$ --	--
Cumulative markon, %	51.9	50.5	49.8	50.9	50.3
Gross margin, % of net sales (incl. cash discounts)	43.5	42.6	42.3	44.7	43.0
Markdowns, retail, % of net sales	22.1	17.6	20.0	16.3	24.0
Number of stock turns (times)	3.8	3.8	3.5	3.5	3.4
Selling salaries, % of sales (main or largest unit)	6.9	--	--	--	--
Sales promotion, % of net sales	2.9	3.7	--	--	--

* Women's & misses', not including juniors'.

Source: National Retail Merchants Association, Merchandising & Operating Results of 1983, (1984 Edition).

RETAIL SALES

Specialty Store Typical Operating Results (continued)

Another trend in recent years has been for men's wear manufacturers and men's wear specialty stores to get into the women's tailored career apparel business, including suits, blazers, jackets and skirts. This was done to counteract soft sales in men's tailored clothing, as well as to take advantage of the fast growth in the number of career women and the popularity of the preppie look. This look has been on the wane, and it remains to be seen if men's wear stores will be able to maintain growth in the women's apparel area.

RETAIL ADVERTISING

Seasonality in Retailer's Newspapers Advertising Linage On Women's & Misses' Coats & Jackets, 1980, 1981, 1983

	Percent of Years' Total Linage by Month												
	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Year
1983	7.1	6.5	6.2	3.4	3.2	2.2	4.1	9.9	11.1	15.8	16.9	13.6	100.0%
1981	7.2	7.0	7.2	5.9	2.9	2.6	3.8	9.1	12.8	15.4	14.9	11.2	100.0
1980	8.1	7.8	7.8	4.8	2.7	3.6	4.3	9.9	11.3	15.1	13.8	10.8	100.0

Source: Advertising Checking Bureau, Neustadt Reports Div., covering retail newspaper linage in seven cities.

BUYING HABITS

Information on purchase patterns of women's tailored wear covered in the following data covering the period January-August 1983 has been supplied by TRAC, a division of NFO Research Inc. The data is based on a nationally representative panel of 40,000 households which keep diaries of their purchases.

The NFO data on tailored women's wear includes blazers, slacks, skirts, suits and coordinates.

Place of Purchase of Women's Tailored Clothing, January-August 1983.
(Percents of Units Purchased)

	Percent
Department stores	29.1%
Women's specialty stores	24.2
National chains (Sears, Penney, Ward)	13.9
Discounters	9.7
"Off-price" retailers	11.1
Mail order	4.5
All other outlets	7.5

Age of Purchasers of Women's Tailored Clothing

	Percent
18 - 24 years	14.9%
25 - 34	24.3
35 - 44	18.5
45 - 54	14.3
55 - 64	15.5
65 & over	12.5

Source: TRAC Division, NFO Research Inc.
Toledo, Ohio.

Working Women

According to a study on women who work, conducted by Mathematicia Policy Research, Princeton, New Jersey, for Newsweek, 64% of women with high level incomes wear skirt-suits (business suits) to their jobs, while 56% of these women report that they wear skirts and blouses.

This report was conducted during mid-1984. The results were tabulated for 713 women from across the nation, who work a minimum of 25 hours per week.

Type of Clothing Worn to Work by Income and Occupation

	Income			
	Low	Medium	High	Professional/Managerial
Skirt suits (business suits)	26%	50%	64%	47%
Dresses	39	51	63	51
Skirts & blouses	47	66	56	62
Pantsuits	44	53	34	48
Pants, sweaters & other sportswear	68	66	47	61
Designer jeans	26	22	14	18
Other jeans	35	22	19	22
Uniforms	20	14	10	19

Note: Percentages add to more than 100.0% because many respondents vary the type of clothing they wear to work.

Source: Study on Women Who Work (1984),
prepared for Newsweek,
by Mathematicia Policy Research,
Princeton, New Jersey.

BUYING HABITS

Teen Buying Habits

In May 1984, 999 teenage girls, members of Seventeen Magazine's 2000 member Consumer Panel, which represents a cross-section of teens nationwide, answered the magazine's Spring Apparel Study on items purchased during the spring of 1984. This information was then projected to the entire female teenage market in order to get an estimate of the total number of girls who purchased apparel items, the number purchased and the amount spent.

Purchases of Specified Suits & Coats by Teenage Girls, Spring 1984

	Number Purchasing Add 000	Number Purchased Add 000	Total Expenditures (thousands)
Coats			
Raincoats - Poplin	2,409	2,522	$141,711
- Slicker	2,057	2,066	51,092
Leather/Suede	1,591	1,725	180,711
Mid-calf	777	783	58,999
Three-quarter length	681	689	34,498
Fake fur coats	399	414	31,808
Real fur coats	293	296	44,394
Total buying coats	7,041	8,495	543,213
Suits			
Jacket & skirt	2,421	4,140	258,211
Pantsuits	1,340	1,584	60,430
Jacket with dress	1,227	2,001	126,523
Jackets			
Blazers	3,121	4,714	232,306
Real fur jackets	267	273	42,419
Fake fur jackets	89	90	4,310
Skirts			
Mini (above the knee)	6,827	14,819	415,969
Knee level	5,943	14,265	398,421
Below knee level	4,809	6,831	170,638

Usual Place of Purchase of Suits & Coats, by Teenage Girls

	Percent
Department stores	67.6%
Specialty stores	24.8
Discount stores	6.7
Variety stores	3.9
Mail order	2.8
All other	3.0

Note: Totals add to more than 100.0% due to multiple mentions.

Source: Spring Apparel Study, 1984
Seventeen Magazine, Triangle Communications, Inc.

BUYING HABITS

Coats

According to a survey of prospective coat buyers, conducted by the Gallup Organization for Apparel Merchandising, between 80% and 85% of respondents expect to buy their next coat on sale; 43% said they planned to buy their next coat in a department store.

Price Expected to Pay for a Full-Length Coat between 1985 and 1987

Expected Price	Wool	Rain	Storm	Affordable Fur
Less than $40	--	11%	13%	2%
$40 - $59	6%	34	29	--
$60 - $79	8	24	15	2
$80 - $99	16	7	11	14
$100 or more	54	24	24	63
Don't know	6	6	8	19

Purchasers Expecting to Pay Sale Price

	Full Length	Short Length
Expect to pay sale price	85%	80%
Expect to pay full price	11	15
Don't know	4	5

Expected Place of Purchase of Coat

	Full Length	Short Length
Department stores	45%	36%
Women's wear stores	19	20
National chains	19	16
Off-price outlet discounters	12	15
Catalog/mail order	3	1
Other	15	13
Don't know	8	12

Source: The Gallup Organization,
Apparel Merchandising,
February 1985.

FUR APPAREL

Market Trends

The U.S. fur apparel industry has been one of the few areas of the apparel industry which has remained consistently strong over the last several years. Currently retail sales of fur garments are estimated at approximately $1.5 billion--about twice the level of six years ago.

One of the major reasons for the continued success of the fur industry has been the increasing numbers of working women. More and more women who are now earning their own income are spending that money on luxury items, such as furs for themselves, rather than waiting, as was the case before the influx of women into the workplace. Likewise, the strong fashion position furs have obtained in the fashion industry over the last few years had aided the increase in fur sales.

Despite the bright picture from the retail side of the industry, domestic manufacturers have been struggling lately. Due primarily to the strong U.S. dollar and cheaper overseas labor, the number of manufacturers in the U.S. in 1984 is estimated to be about 20% fewer than five years ago. The major casualty of the consolidation of the industry have been the smaller "mom and pop" type outlets which manufactured lower-priced furs. These types of operations have been taken over by foreign competitors in Korea, Hong Kong, Canada and Greece. Industry insiders do report, however, that the quality of these imported goods is not up to that of the upscale, higher-priced furs which are made in the U.S.

Over-promotion is another problem which is now plaguing the fur industry. Many retailers now feel that customers have grown accustomed to huge reductions in prices, and thus wait till heavy promotional periods to buy. While many retailers want to end the heavy promotional end of the business, they report that they are forced to continue it as that is the time when most customers wait to buy.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

The latest detailed information on the fur industry comes from the recently released 1982 Census of Manufactures, U.S. Department of Commerce. The census previous to the 1982 was in 1977, the results of which are also covered in the following table.

According to the census, the value of industry shipments in the fur industry increased by only 9.4% in the five year period between 1977 and 1982, while the number of companies in the industry decreased by about 20%, and employment fell approximately 15%.

According to the Furriers Joint Council, the number of workers in the fur industry stands at about 5,000 in 1985, with many of these working for themselves. This source estimates that the total number has remained relatively unchanged in recent years (Forbes 5/6/85).

GENERAL INDUSTRY STATISTICS

Fur Goods (SIC 2371*)

	1982	1977	% Change 1982/1977
Number of companies	503	620	- 18.9
Number of establishments, total	504	620	-118.7
Number with 20 or more employees	43	48	- 10.4
Employees, total (thous.)	3.4	4.0	- 15.0
Production workers (thous.)	2.5	3.2	- 21.9
Payroll (mil. $)	$ 59.6	$ 51.5	+ 15.7
Value added by manufacture # (mil. $)	131.6	112.8	+ 16.7
Value of industry shipments ## (mil. $)	419.3	383.4	+ 9.4
Capital expenditures, new (mil. $)	0.3	0.5	- 40.0

* SIC 2715 includes establishments primarily engaged in manufacturing fur coats and other garments, accessories, and trimmings made of fur. The industry includes producers of fur caps, coat linings, glove linings and other fur apparel, such as capes, coats, hats, jackets and neckpieces. Establishments primarily engaged in manufacturing sheep-lined clothing are classified in Industry 2386, and those engaged in dyeing and dressing of furs in Industry 3999.

Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished goods inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

Value of industry shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary products and secondary products made by manufacturers in these industries. The value of shipments of fur goods only by all producers, (product shipments), including manufacturers making them as secondary products, is covered on page 31.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982.

Concentration in the Industry

Data on the number of plants by employment size for 1982 from the census of manufacturers indicates that a great majority of the firms involved in the fur industry are small, employing fewer than 5 employees. It must be noted that these figures include only establishments with a payroll at some time in 1982 and thus a large proportion of family run, small size establishments are excluded from the total. Thus, the percent of manufacturing facilities with fewer than 5 employees would be higher than the 61% reported by the census bureau.

GENERAL INDUSTRY STATISTICS

Concentration in the Industry (continued)

The Fur Goods Industry by Employment Size, 1982

	Establishments		Employees		Value Added By Manufacture	
	Number	% of total	Number (Thous.)	% of total	Mil. $	% of total
Fur goods, (SIC 2371), total	504	100.0%	3.4	100.0%	$131.6	100.0%
By establishment size:						
1 to 4 employees	308	61.1	0.6	17.6	17.2	13.1
5 to 9 employees	91	18.1	0.6	17.6	25.0	19.0
10 to 19 employees	62	12.3	0.8	23.5	37.1	28.2
20 to 49 employees	37	7.3	1.0	29.4	43.4	33.0
50 to 99 employees	5	1.0	0.4	11.8	8.7	6.7
100 or more employees	1	0.2	--	--	3.6	2.7

Source: U.S. Bureau of the Census,
1982 Census of Manufactures,
MC82-1-23D.

Further data on industry concentration in the fur industry covering 1984 is available from Sales & Marketing Management magazine's Survey of Buying Power, as summarized below.

Employment & Share of Shipments in Large Plants, 1984

	No. of Plants		Total Shipments (Mil. $)	% of Shipments From Plants With 100+ Employees
	With 20+ Employees	With 100+ Employees		
Fur goods (SIC 2371)	111	5	$236.6	15%

Source: Sales & Marketing Management Magazine
"Survey of Industrial Purchasing Power"
April 1985, all rights reserved.

Location of the Industry

According to the 1982 census of manufactures, New York has remained the leading state for production of fur garments as it did in 1977. More than 87% of the plants in the industry were located in New York in 1982 with these plants accounting for 91% of the value of fur garments shipped in the U.S. in that year.

Location of the Industry (continued)

The Fur Goods Industry by Region, 1982

	Establishments		Shipments	
	Total	With 20+ Employees	(Mil. $)	% of Total
Fur goods, total	504	43	$419.3	100.0%
New York	439	40	385.5	91.9
All other states	65	3	33.8	8.1

Source: U.S. Bureau of the Census,
1982 Census of Manufactures,
MC82-I-23D.

PRODUCT SHIPMENTS

According to the 1982 census of manufactures, the value of shipments of women's furs by all producers, declined in 1981 and 1982, 26.3% during this period to $397.9 million.

Shipments in the fur industry have been increasingly concentrated in larger plants, a trend which has been continuing since the early 1970's. The U.S. Bureau of the Census reported that in 1972 the four largest plants accounted for about 7% of shipments, while for 1984, Sales and Marketing Management reports the top 5 plants accounted for about 15%. Although direct comparisons between the two different sources should not be made, the overall trend toward concentration in larger plants can be identified.

Value of Product Shipments of Fur Goods, 1979-1982
(Millions of dollars)

	1982	1981	1980	1979	% Change 1982/1981	% Change 1982/1979
Fur goods, total	$397.9	$497.4	$539.8	$466.8	- 23.7%	- 14.8%

Source: U.S. Bureau of the Census,
1982 Census of Manufactures,
MC82-I-23D.

FOREIGN TRADE

Imports have become a major influence in the fur industry. While they have contributed significantly to the boom at the retail level, they have caused some furriers to wonder about the future of low-end domestic manufacturing, while others are now concerned that the quality of imports may erode consumer confidence--and interest in furs.

The latest figures from the American Fur Industry, a trade association, indicate that retail sales of imported furs amounted to $61.5 million in January and February 1985, a 34% increase over the first two months of 1984. Overall the AFI reports that imported furs now account for about 20% of total retail sales.

FOREIGN TRADE

Overall imports of furs increased 65% in 1984, climbing to a total of $347 million in that year, according to information from the Bureau of the Census.

The Korean Republic, which replaced Hong Kong as the top supplier of imported furs in 1981, has held the top position through 1984. In 1984, Korea was reported to have accounted for about one-third of all furs imported. Between 1983 and 1984, the value of fur garment imports from Korea increased 38.2%.

Canada, the second largest supplier of furs to the U.S., registered an increase of 99.2% in imports, while the number three supplier, Hong Kong, recorded an increase of 81.4%.

While imports have been skyrocketing over the last several years, exports have been going in the opposite direction. Between 1979 and 1984, the value of exports has dropped 47% to $33 million.

The Value of Imports of Fur Clothing & Articles
By Leading Country of Origin, 1982-1984
(CIF value in thousands of dollars)

	1984	1983	1982	% Change 1984/1983
Total value	$346,594	$219,596	$137,106	+ 64.5%
Korean Republic	114,925	83,183	51,138	+ 38.2
Canada	74,577	37,438	29,386	+ 99.2
Hong Kong	69,688	38,412	19,491	+ 81.4

The CIF value refers to the value of imports at the first port of entry in the U.S. It is based on the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports, FT 135.

RETAIL SALES

As previously mentioned, total retail sales of fur garments were estimated at $1.5 billion in 1984. The industry had only crossed the $1 billion plateau in 1981.

While total retail sales of fur garments have been booming over the last few years, not all segments of the industry have been sharing in the success. The primary benefactors of the increase have been retailers selling high priced furs, while those in the moderate to lower priced categories have not fared as well.

RETAIL SALES

Promotion has become the catch word in the fur retailing industry. While most retailers today say they believe the amount of promotional activity in the industry is harming their profit margins, promotion continues to increase every year. Since customers have become accustomed to the fur business as highly promotion oriented, most retailers see eliminating the promotions as a difficult task.

The impetus behind the growth of the fur industry in recent years is from several different factors--including the importance of furs in the wardrobes of the rapidly growing, expanding number of career/professional women and the growing popularity of furs among young women. In past years, furs were mainly worn by older women and were usually not purchased by the women themselves, but rather by a male. Now, women buy furs for themselves with a wide variety of furs allowing women to have many choices between styles and price lines, thus allowing many women to build a wardrobe of furs.

Like the manufacturing end of the industry, the majority of fur retailers are small scale operations working out of single unit shops or leased space. The U.S. Department of Commerce reports that in 1982, nearly six out of every ten furriers or fur shops with a payroll employed fewer than five employees.

Furriers and Fur Shops by Employee Size, 1982
(Establishments with paid employees, only)

	Number	Total	Number	Total	Mil. $	Total
Furriers & fur shops, total	842	100.0%	5,464	100.0%	$78,965	100.0%
By establishment size:						
Under 5 employees	506	58.0	1,077	19.7	14,753	18.7
5 - 9 employees	223	25.6	1,505	27.5	20,668	26.2
10 - 19 employees	92	10.6	1,239	22.7	19,365	24.5
20 or more employees	51	5.8	1,644	30.1	24,197	30.6

Source: U.S. Department of Commerce,
County Business Patterns, 1982.

According to preliminary data from the 1982 Census of Retail Trade, sales of women's fur account for 0.6% of sales in women's wear stores in 1982, down from 1.3% in 1977. In family clothing stores, the percentage of sales dropped from 0.3% to 0.1% in the same period. Comparable figures for department stores are not yet available for 1982.

It must be noted that all figures currently available from the 1982 Census of Retail Trade are preliminary and are subject to revision when final reports are released, later this year.

Percent of Total Sales Accounted for by Furs & Fur Garments In Key Store Types Reporting Sales, 1982(p)

	Total Retail Sales (Million $) 1982(p)	Percent of total accounted for by: Furs & Fur Garments 1982(p)	1977
Women's wear stores	20,311	0.6%	1.3%
Family clothing stores	13,471	0.1	0.3

(p)--preliminary
na--not available

Source: U.S. Department of Commerce,
1983 Census of Retail Trade,
(Preliminary reports).

Department Stores

Fur departments in department stores with a total volume of $1 million or more registered a median gain of 20.5% in 1983 over 1982, according to the National Retail Merchants Association. Sales per square foot averaged $352.5 compared with $203 in 1981 and $153 in 1979. The fur department accounted for a typical 1.9% of total sales in the adult female department in 1983, compared with 1.5% in 1981.

Merchandising & Operating Results in Fur Departments, 1983
(Median Results for Department Stores with Sales Over $1 Million)

Net sales, % change from 1980	+ 20.5%
Net sales, % of adult female apparel	1.9
Net sales, % of total store sales	0.5
$ sales per sq. ft. of selling space (main or largest selling unit)	$352.6
Cumulative markon, %	45.4%
Gross margin, % of net sales (including cash discounts)	38.8
Markdowns, retail, % of net sales	16.1
Number of stock turns (times)	2.1
Salespeople's salaries, % of sales (main or largest selling unit)	6.9
Sales promotion, % of net sales	6.0

Source: National Retail Merchants Association,
Merchandising & Operating Results of 1983,
(1984 Edition).

RETAIL SALES

Department Stores (continued)

Percent of Department Store Sales of Women's Furs 5 Year Average, by Month

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Year
Furs	8.4	6.0	6.1	6.1	4.3	2.4	4.1	9.0	7.9	12.4	13.1	20.2	100.0%

Source: Newspaper Advertising Bureau, based on
Federal Reserve Board data, 1961-1965,
(latest available).

RETAIL ADVERTISING

Seasonality in Retailers' Newspaper Advertising Linage On Women's Furs & Fur Garments, 1979, 1981

Fur & Fur Garments	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Year
1983	14.4	11.0	5.5	4.1	3.0	1.8	4.6	9.7	8.7	10.3	10.9	16.0	100.0%
1981	14.6	11.1	7.7	2.8	3.6	1.8	4.1	9.1	9.2	8.6	12.9	14.4	100.0
1979	10.4	8.4	6.2	4.3	2.5	1.6	4.9	10.2	9.8	11.1	17.0	13.6	100.0

Source: Advertising Checking Bureau, Neustadt
Reports Division, covering retail newspaper
linage in seven cities.

(For Consumer Buying Habit Information on furs, see pages 24 and 24)

FAIRCHILD FACT FILES CURRENTLY AVAILABLE

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1984 Edition available now--1985 Edition will be available in February, 1986)

DEPARTMENT STORE SALES: (Including selected major apparel specialty store sales) Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1984 Edition available now--1985 Edition will be available in January, 1986)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and buying habits. (1984 Edition available now--1985 Edition will be available in August, 1985).

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRICAL HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more. (Includes a new consumer buying intention survey) (October)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: (Including Tailored Casual Wear) Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits. (November)

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits.

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations, of the large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Also covered are developments in brand name merchandising, store labels, designer labels, licensing and off-price retailing.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and physical fitness.

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

A STATISTICAL ANALYSIS OF RETAILING: A detailed statistical summary of retail trade in the U.S. based on findings in the 1982 Census of Retail Trade issued this year by the U.S. Census Bureau. Includes information on the number of outlets by store type, sales, market shares by type of major merchandise classification, sales concentration by size of retail organization, geographical changes, etc. Comparisons are made with findings in the last previous census, covering operations in 1977. (December)

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery. (August)

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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